

Title: Performance Analyst

Summary:

The Performance Analyst will be responsible for calculating, reviewing and reporting on performance for all GW&K investment strategies and their benchmarks.

Responsibilities:

- Calculate, review and disseminate performance and related data to be used in internal reporting, marketing materials and custom client reporting
- Validate underlying data used in the performance calculation and work with various groups (Operations, Client Service, IT) to resolve any issues or discrepancies
- Analyze individual account performance to identify reasons performance may be out of line with the composite and/or benchmark
- Utilize performance attribution tools to produce analytical reports for management to evaluate effectiveness of investment decisions and explain performance to clients
- Maintain compliance with the GIPS standards, participate in annual GIPS verification, update and review all GIPS compliant materials and keep abreast of changes in the Standards
- Ensure accuracy of performance data used in marketing materials and in responses to external requests for performance such as RFPs/RFIs
- Willingness to expand role in the group to assist with custom client requests, product and competitor research, data and automation used in Seismic
- Assist the Performance and Analytics group with various special projects and initiatives
- Continuously look for ways to enhance outputs and streamline processes and procedures to improve efficiency and accuracy

Qualifications:

- Bachelor's degree, preferably in business, finance, or economics
- 3+ years of relevant experience in a Performance Analyst role
- CIPM, CFA or progress towards is preferred
- Exceptional working knowledge of Excel, experience with SQL and Tableau very helpful
- Working knowledge of GIPS standards
- Must be detail oriented, possess strong organizational skills and work well under pressured time constraints while meeting strict deadlines
- Strong team orientation but also self-motivated and able to complete projects independently
- Demonstrated desire to further develop industry and market knowledge