

First Quadrant Job Description

Job Title: Research Associate – Investment Specialist

SUMMARY

The purpose of this role is to analyze the investment process and performance of the firm's strategies, and to communicate it to clients and internal groups. This role will assist in the production of research papers on market trends and other topics of interest to investors. This role will develop a high degree of understanding of the investment process, and will be able to assist clients in determining how best to use the firm's products.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Conduct analysis of financial markets and investment portfolios
- Assemble market and portfolio data – e.g., performance attribution, portfolio characteristics, etc, on a systematic basis
- Identify key drivers and themes
- Communicate findings to clients and internal groups verbally and in writing
- Conduct research on topics of interest to clients
- Support sales and marketing effort
- Some travel may be required

EQUIPMENT/SOFTWARE USED

PC; general office equipment; Windows. Software used: Microsoft Word, Microsoft Excel, SAS.

QUALIFICATIONS To perform this job successfully, an individual must be able to perform each essential duty/responsibility satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required to complete the essential functions.

- **EDUCATION:** Bachelor's degree or equivalent. Advanced degree such as MBA preferred but not required.
- **WORK EXPERIENCE:** 0-3 years of finance industry experience. Finance industry experience preferred but not required. Must demonstrate strong interest in financial services industry.
- **LANGUAGE SKILLS:** Ability to effectively communicate in English both verbally and in writing. Ability to effectively present information in one-on-one and group situations to employees and third parties. Ability to write reports and present data for both internal and external consumption.
- **MATHEMATICAL & ANALYTICAL SKILLS:** Strong mathematical and analytical skills, including basic knowledge of statistics, are required.
- **PROGRAMMING SKILLS:** Knowledge of SAS is required, but may be learned on the job. Pre-existing familiarity with at least one programming language is required in order to establish an ability to learn SAS on the job. Basic knowledge of Excel is required.
- **REASONING ABILITY:** Strong reasoning and analytical capabilities are required. Must be able to grasp logic inherent in key financial theories, to construct logical arguments related to both empirical questions and the interpretation of empirical results, and to engage in mathematical reasoning in the form of a mathematical proof. The ability to logically interpret program code

written in SAS is required.

- OTHER SKILLS: Must be effective in interacting with others in team settings.