SEARCH PROFILE

University of Toronto Asset Management
Investment Analyst, Private Markets

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THE ORGANIZATION

Our Client, the University of Toronto Asset Management (“UTAM”) is the investment manager for the University of Toronto’s Pension, Endowment and short-term working capital assets. UTAM manages over $10 billion in assets with a team of more than 20 professionals. They invest globally across a variety of asset classes using a wide range of strategies. Their sole focus is to invest university assets. Please refer to https://utam.utoronto.ca/ for more information about them.

THE OPPORTUNITY

Job Title: Investment Analyst, Private Markets
Reports to: Head of Private Markets
Location: Toronto, ON

MANDATE

Due to growth of the investment team, UTAM has created a new role and is looking to add an Investment Analyst, Private Markets to the team, which will report to the Head of Private Markets. The Analyst conducts research and analysis to help identify, evaluate and manage private markets investments globally. While focused on private markets, the Analyst will also participate in regular internal investment team meetings and gain exposure to all asset classes. This is a great opportunity to join a collaborative and high performing team with an exceptional leader at the helm.

KEY ACCOUNTABILITIES

- Help manage the pipeline of private market investment opportunities, schedule and attend meetings/calls with existing and potential investment managers, and update and maintain UTAM’s investment management research database.
- Support and implement various aspects of the investment process, including conducting analysis and due diligence on potential investments/managers; creating detailed financial models and analysis in Excel; and, assisting in the closing and portfolio reporting processes for completed investments.
- Participate in the portfolio management and monitoring of UTAM’s private markets investment portfolio, including allocation analysis, investment pacing, performance analytics, and completion of reviews of existing investments.
- Assist in developing, writing and presenting detailed investment recommendation memos.
- Conduct industry research and analysis on private markets.
- Undertake domestic and international travel as required.
- Performance of other duties and ad-hoc projects as required.
CANDIDATE PROFILE & QUALIFICATIONS

- A minimum of a Bachelor’s Degree is required, with a strong academic record; an undergraduate or graduate degree in a finance-related discipline is preferred.
- One or more years of investment management or related work experience, ideally with practical experience in private markets (Private Equity, Real Estate, and/or Infrastructure) and in manager selection within an institutional investor context. Candidates with less full-time work experience, but with completed “co-op” work terms in private investments will also be considered. Experience in secondaries and/or co-investments is considered an asset.
- Progress towards, or completion of, the CFA designation is considered an asset.
- Strong written and oral communication skills.
- Sound judgment, very close attention to detail, and an ability to manage multiple initiatives or projects concurrently.
- Well-developed quantitative analytical skills, including strong financial modeling capabilities in Excel. High proficiency expected in Word and PowerPoint.
- Interest and ability to work in a collegial, small-team environment.

COMPENSATION

Competitive compensation package in the form of salary, annual bonus, vacation allowance, and support in completing CFA designation (financial and paid study leave). In addition, UTAM offers a comprehensive benefits package, including a defined-benefit pension plan.

APPLICATIONS

To apply, please send your resume in Word or PDF format to Angus McComb at amccomb@optimumtalent.com

Copy and Paste the following job title and code and place it in the subject line of your email so we can identify the job and confirm receipt of your application:

A019114 (AFTH-270505) Investment Analyst, Private Markets - Toronto (OTIAPPLY)