

Smart Beta Portfolio Analyst

Firm Overview:

Rothschild Asset Management Inc. (RAM) manages investment solutions covering a range of strategies including U.S. equities, alternatives and smart beta.

Role Objective: The Smart Beta Portfolio Analyst role is a great opportunity for an individual interested in leveraging quantitative finance abilities in supporting investment management and business growth of Rothschild's Smart Beta business and products. In this role you will report to and work directly with a Senior Portfolio Manager on developing and enhancing tools that aid in portfolio management and conduct various data-intensive analysis in support of product development, investment decision making, reporting and client requests. This role will lead into a Junior Portfolio Manager over time.

Key Responsibilities:

- Support the portfolio management team on technical and quantitative projects as well as portfolio management tasks: fund rebalancing, trading inflows, equitizing cash with ETFs, monitor and report on corporate actions, etc.
- Perform data preparation and analysis for regular and ad hoc requests, i.e. portfolio attribution; monthly rebalance analysis, portfolio analysis and checks, monthly/ quarterly/semi-annual commentary
- Develop tools and platform enhancements to bolster productivity through innovative system-building and automation
- Collaborate with Operations, IT, Sales/Marketing on daily processes tasks and client deliverables as needed

Qualifications:

Basic Qualifications:

- Bachelor's degree with a strong academic record in a quantitative or technical discipline with a minimum of two years of relevant experience or a Master's degree with a minimum of one year of relevant experience
- Minimum GPA of 3.2/4.0 or better
- Basic knowledge and understanding of the financial industry
- Solid quantitative and technical abilities
- Self-starter with high initiative and comfort working in a fast-paced environment
- Positive attitude and strong work ethic
- Strong interpersonal skills with the ability to partner effectively in a team and build trust and confidence of colleagues
- Excellent oral and written communication skills
- Clear judgment, critical thinking and intellectual curiosity
- Highly organized with exceptional attention to detail and excellent follow-through
- Ability to work independently and take on project ownership
- Flexibility with respect to assignments, deadlines and hours
- Ability to handle special projects and ad-hoc requests

Preferred Qualifications:

- Experience with Excel/VBA, SQL, R/Python, and/or Bloomberg
- Understanding of risk parity/equal risk contribution framework
- Experience with other Smart Beta products and/or ETFs
- Some trading or trading assistance experience

Rothschild North America is an equal opportunity and affirmative action employer (M/F/Disability/Vet)