Casterbridge

JOB DESCRIPTION

Job Title:	Junior Investment Manager
Location:	Office based in Putney (Hybrid)
Salary:	£24,000 - 35,000 per annum FTE, depending on experience/qualifications
Reports To:	Investment Director/DCIO
Responsible For:	No management responsibilities

About Casterbridge

Casterbridge is a fast-growing, multi-award-winning investment management firm that has seen rapid success in the 9 years since opening its doors. This highly ambitious group are looking at opportunities to take the business to the next level of expansion and success. The team has been carefully gathered over time to ensure a strong and collaborative team-based culture that is essential to the firm's future success. Casterbridge takes pride in delivering excellent service, placing the client at the heart of everything we do. Casterbridge are an equal opportunities employer.

Job Overview

You will be responsible for providing comprehensive support to the Discretionary investment management team and research function, whilst developing knowledge and skills to undertake the Wealth Management Level 7 qualification, eventually moving into the role of fully qualified Investment Manager and gaining Chartered status.

You will be a trusted reliable and professional support, maintaining up to date knowledge on global economic indicators, investment markets and financial products available to clients, including bonds, stocks, alternative investments, and trusts/collectives. The role will work closely with investment analysts to assess financial information and investment opportunities, and to provide value-added service to both the investment process, as well as internal and external clients.

The team thrives on a culture of kindness, collaboration, and boldness, and the individual will be expected to uphold and contribute to this environment. The individual will share investment views in internal firm forums and as their career progresses, with clients. This responsibility will include providing regular updates on market development and addressing bespoke topics as requested.

The individual will develop expertise in a number of asset classes and act as a key resource for the Strategic/Tactical Asset Allocation Committee, colleagues serving clients directly, and over time, clients themselves.

Responsibilities and Duties

<u>Discretionary Investment Team Support:</u>

- Prepare investment proposals and assist with updating existing proposals (where required), monitor new client prospects as well as new client account asset transfer schedules and new account portfolio construction timelines, according to the weekly investment report.
- Collaborate with distribution, product and risks teams to support new business opportunities and client retention.
- Support the trading/investment process by monitoring market developments, news, and trends to help identify potential trading opportunities, strategies and risks, communicating relevant information to the investment team.

- Continuously assess trade performance and execution strategies to identify areas for improvement and enhance overall portfolio performance.
- Assist with discretionary and collective portfolio trading requirements including building client trades, trade blotter management, trade execution via the dealers or the order management system, post trade checks and liaising with the third-party administrator to deal with queries.
- Prepare screening papers for presentation to the Investment Committee, sourcing and evaluating independent research.
- Monitor and report on corporate actions.
- Implement portfolio strategy through security selection, sector allocation, geographic exposure, credit and duration decisions.
- Assist in the management of discretionary models.
- Assist in the monthly collection of Consumer Duty Management Information.
- Assist with the portfolio administration process, providing communications between the investment team, client management administration team and the third-party administrator.
- Work towards becoming a point of contact of advisor and client queries.

Research Support:

- Provide support to the research function including discretionary model management, direct equity research and ongoing monitoring, price target review and management.
- Attend, contribute, and selectively minute key meetings including Discretionary Investment team meetings (Traders), Investment Committee Meetings and ad-hoc third party fund manager presentations.
- Monitor and interpret macroeconomic, monetary policy, and market developments to help inform investment decisions.
- Actively participate in strategy meetings providing insightful market knowledge and ideas.
- Daily monitoring of portfolio risk with respect to alignment with active investment views and consistency with fund objectives.

Marketing Support:

- To develop relationships with the Casterbridge Wealth adviser network and to assist in the expansion of business contacts to contribute to growth and profitability targets.
- Assist with marketing activities including writing of investment pieces, ad-hoc response to advisers and other presentations online or in person.

Compliance:

- Ensure adherence to in-house compliance procedures and rules, as well as a thorough understanding of FCA regulatory guidelines and rules.
- Maintain a thorough understanding of relevant market regulations and compliance requirements.
- MiFID II conversant.
- To help make decisions about financial and investment opportunities on behalf of clients by trading (CGT management/Bed & ISA) and ongoing model management, under supervision until internal process requirements have been met.

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Person Specification

CRITERIA	ESSENTIAL	DESIRABLE
Qualifications	Degree level education Investment Advice Diploma (CISI Level 4) A willingness to undergo further personal and professional development to Chartered Wealth Manager status	2:1 or above Regulated SM and maintains Statement of Professional Standing in line with professional body requirements
Knowledge	Demonstrate an understanding of global economics, financial markets and portfolio management Knowledge of Microsoft Office applications, in particular advanced level Excel skills and PowerPoint presentation	Experience in business development, strategy, and research Proficiency in using trading and analytics platforms such as FactSet and/or other relevant tools Interest and enthusiasm in driving change through investments
Experience	Proven experience of working within the investment industry for at least 2 years Strong ability to multi-task and pivot between research, analysis and written communication of findings Self-starter with strong ability to think independently, strategically, and outside of the box	Investment adviser or Junior Investment Manager Both investment and client facing experience Experience in Fund research report writing
Skills/Qualities	Demonstrate effective analytical skills and the ability to pay close attention to detail, meeting high ethical standards Demonstrate effective time management and the ability to meet deadlines and work on multiple projects simultaneously Demonstrate excellent writing skills, exceptional interpersonal and communication skills, both verbal and written, through a range of communication methods Demonstrate an ability to work independently whilst also contributing to the success of the team, and to develop and sustain good working relationships with internal and external clients	Outstanding written and oral presentation skills Ability to work with precision under pressure and operate in a fast paced and demanding environment Ability to articulate investment views to client and internal stakeholders