

Senior Investment Analyst at Jubilee Insurance

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Company: JobWebKenya

Location: Kenya

Category: business-and-financial-operations

Job Description

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Jubilee Insurance was established in August , as the first locally incorporated Insurance Company based in Mombasa in . Jubilee Insurance has spread its sphere of influence throughout the region to become the largest Composite insurer in East Africa, handling Life, Pensions, general and Medical insurance.

Job Ref. No: JLIL

Role Purpose

The senior investment analyst will be responsible for research, investment analysis and provision of relevant information and recommendations on equity and fixed income investments. The role holder will also be required to be up to date with macro-economic trends, market developments as well as monitoring corporate actions of listed companies.

Main Responsibilities

Personal Effectiveness

Accountable for service delivery through own efforts.

Individually accountable for managing own time, tasks, and output quality

Making increased contributions by broadening individual skills

Collaborating effectively with others to achieve personal results

Accepting and living by the company values.

Investment Analysis

Researching, analyzing, and providing relevant information.

Analyzing the position of listed and unlisted companies within the investment universe.

Projecting short and long-term macroeconomic forecasts for factors such as GDP, inflation, and interest rates, as well as industry and company specific financial projections, with clearly identifiable performance drivers.

Investment Recommendation

Making recommendations regarding investment attractiveness of equities and fixed income securities

Transferring relatively complex information to diverse audiences.

Reporting & Relationship Management

Responsible for reporting to the management investment committee while incorporating economic and market overviews, portfolio valuation, performance, and strategy for the following quarter.

Preparing strategy papers, investment recommendations and reports to the Board, CEO, and Investment Committee.

Actively manage relationships with the fund manager and other market participants.

Annual review of the investment policy statements of the funds as well as development of investment policies for new products.

Requirements

Key Competencies

Technical knowledge in Investment

Decision Making

Planning & Organizing

Analytical Skills

Ownership & Commitment

Highly Numerate

Qualifications

Bachelor's degree in Finance/ Investments

CFA Qualification will be an added advantage.

Relevant Experience

Minimum of 3 years' work experience in financial modelling and investment analysis

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