

INVESTMENT ANALYST

Role Description

Analysts form the backbone of our fund. The contributions of Investment Analyst to the organization are how we develop innovative investment theses, execute our various investment strategies, and achieve our return objectives. You will be exposed to one of four portfolios, each with its own unique strategy, asset allocation, and potential directions to explore. This responsibility is at the heart of what QUAAF seeks to accomplish through a combined mandate of education and practical application. By helping to manage or create a portfolio of investments curated by past teams, you will have the opportunity to experience what has been built to this point and have material influence on portfolio construction going forward.

Responsibilities

- Support the Portfolio Manager and Investment Team on fund Due Diligence, Research, and Investment Analysis processes.
- Monitor and perform Due Diligence on investments within your Portfolio Team's strategy and goals in accordance with the assigned procedure.
- Identify ideas to improve the Portfolio Team in researching of investments on the Watchlist and/or improving the Due Diligence or Investment Analysis processes.
- Attend QUAAF Weekly Group Meetings ("Group Meetings") to enrich your understanding of the investment management industry. Attendance is required at every meeting.
- Generate PowerPoint presentation slides and conduct boardroom-style presentation in collaboration with teammates during the weekly meeting to the entire QUAAF team.
- Maintain active coverage on the underlying investments within the portfolio to obtain necessary data and understand investment strategies.
- Attend your team's Weekly Investment Strategy Meetings ("Investment Team Meetings"). An analyst must attend the weekly fund team meeting that is organized by your PM. At this meeting, the PMs and analysts will discuss strategies and presentation skills for the QUAAF Weekly Group Meeting.
- Learn a Due Diligence or Investment Analysis process and perform Due Diligence or Investment Analysis on an assigned fund or investment.
- Present at least 2 investment ideas during your tenor at QUAAF.
- Assist and participate in Monthly Investment Team portfolio review presentations.
- Participate in Weekly all hands-on meetings on Sunday as well as other team calls.

Submit a resume and 3 min max video telling us about your unique skills and why you think you are a good fit for QUAAF to quaaf@queensu.ca

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Portfolio Descriptions

QUAAF has openings in the following Portfolios, each with its own Portfolio Manager and team of Investment Analysts:

Fund of Hedge Funds:

✓ Seeks consistent superior risk-adjusted returns by investing in externally managed Canadian-run alternative investments, such as hedge funds. Appropriate strategies include, but are not limited to, Equity Long/Short, Market Neutral, Merger Arbitrage, Convertible Arbitrage, Event-Drive, Credit, Fixed-Income Arbitrage, Global Macro, Short-Only, and Quantitative. Strategic timeframe (12-36 months).

Thematic:

✓ Seeks high-growth opportunities through a thematic investment strategy. This portfolio uses a top-down investment approach to gain exposure to technology and long-term structural changes. Investments range from single securities to more complex strategies involving baskets of securities. Tactical timeframe (0-18 months).

Sustainable Investing:

✓ Seeks to identify opportunities that capitalize on the companies that are best positioned to grow while pioneering better ways of doing business through superior performance in environmental, social, and governance (ESG) categories. This portfolio has the ability to invest in both external funds and traditional securities. Strategic and/or tactical timeframe.

Real Estate:

✓ Seeks to identify opportunities to capitalize on growth within the real estate sector such as infrastructure, retail, commercial, and residential. The portfolio shall have a geographic focus in North America. Strategic timeframe.

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