Senior Analyst, Fundamental Research, Public Equities

Regina

Greystone Managed Investments Inc., overseeing more than $30 billion of assets under management, is one of Canada’s largest managers\(^1\) of pension assets. Our employee-controlled firm offers our institutional clients a complete range of fixed income, domestic and global equities, infrastructure, and mortgages and real estate investments. Our clients include corporate and public pensions, government organizations, private foundations, trusts and charities, health care organizations, universities, insurance companies, trade unions and workers’ compensation programs, third-party platforms, sub-advisory relationships and employee and professional associations.

To support the firm’s continued growth, we have an opportunity in our Regina head office for a Senior Analyst within the Public Equities team. Reporting to the Senior Vice-President & Lead, Canadian Equity & Head of Fundamental Research the individual will be responsible for equity research for assigned sector, making stock recommendations and leading or assisting in key projects focused on the ongoing improvement of our investment management process.

**Key Responsibilities:**

- Detailed business and financial analysis of publicly traded companies
- Develop a deep understanding of the company business model, revenue and cost drivers, competitive positioning and industry dynamics
- Analyze company financials to assess economic profitability, capital intensity, balance sheet strength and free cash flow production
- Conduct macro analysis and recommend sector allocation
- Evaluate company management's track record, operating strategy, capital allocation philosophy and actions
- Conduct due diligence with senior management, industry contacts, sell-side analysts, and other valuable primary sources
- Take the lead in creating investment recommendations which communicate key company attributes, research conclusions, valuation and major risks/concerns
- Monitor processes to identify improvements in order to take Fundamental Research to a higher level,
- Gain a deep understanding of the quant and risk aspects of the investment process
- Maintain and update internal models as required
- Client interaction; some global travel may be required
- Attend industry conferences and seminars to gather information
- Mentor junior analysts

**Knowledge/Skills/Abilities:**

- 3 to 7 years of industry experience within capital markets in research, investment banking or related
- Relevant post-secondary education, undergrad in math, finance, accounting, economics, or related studies. Preferably working towards or hold a CFA designation; MBA would be an asset
- Solid analytical and modelling skills

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\(^1\) Top 40 Managers Report, Benefits Canada, November 2016 based on Canadian pension assets as at June 30, 2016.
- Exceptional skills in Excel including macros
- Prior knowledge and experience of using FactSet and Bloomberg
- Programming in SQL, Python or R would be considered an asset
- Ability to work in a fast-paced team environment

Greystone has been recognized for its unique culture and was a recipient of one of Canada’s 10 Most Admired Corporate Cultures (2012, 2015) by Waterstone Human Capital and Focus Elite (2012, 2013 and 2014) by Focus Consulting Group. If you are interested in working for a firm that provides a team-oriented work environment, a competitive compensation package, and opportunities for employee share ownership and professional development, please visit www.greystone.ca or express your interest by April 7, 2017 to:

Greystone Managed Investments Inc.
300 Park Centre, 1230 Blackfoot Drive
Regina, Saskatchewan S4S 7G4
Email: careers@greystone.ca