



McInroy & Wood

PERSONAL INVESTMENT MANAGERS

McInroy & Wood Limited – Graduate Investment Analyst

A full-time trainee Investment Analyst is required to join the small and well-established investment team within McInroy & Wood Limited (www.mcinroy-wood.co.uk), a leading independent discretionary private client investment manager based in Haddington, East Lothian. McInroy & Wood manage over £2bn worth of clients' investments, which are invested directly around the world. We are proud of our collegiate approach and strive to build a diverse team, recognising the benefits this brings to our clients and colleagues.

Key attributes

Investment Analysts carry out research that is used to evaluate investment opportunities. They explore macro-economics and investigate a range of investment assets including equities and bonds. As well as monitoring assets that we already invest in, generating new investment ideas is a crucial aspect of the role.

Analysts are expected to contribute to business development efforts and generally support the undertakings of the investment team. In addition, there may be opportunities to participate in operational projects, which vary widely in their remit.

The successful candidate will receive all necessary training, mentoring, and support in completing professional qualifications (principally CFA charterholder status). There will be opportunities for international travel to attend investment seminars and to visit company management.

Working in a largely private client environment, the candidate will have a meticulous nature, excellent interpersonal skills and will work to a high standard of accuracy. They will be curious by nature and seek to identify and pursue imaginative new investment ideas. The successful candidate will be a proactive individual who will work collaboratively to enhance the department's performance and contribute to the firm's overall success.

Responsibilities

- Review and prepare macro-economic research material.
- Review and prepare stock-specific research material, including attending company meetings and preparing 'company news' commentary.
- Contribute to monthly company ratio meetings.
- Research and propose new investment stock ideas.
- Assist investment managers and dealers with the review of client portfolios, including the preparation of investment plans.
- Contribute to developing new business introductions, both direct and indirect (e.g. through intermediaries such as accountants, lawyers etc.).
- Assist in the preparation and analysis of performance statistics.
- Attain IMC and CFA charterholder (or equivalent) qualifications.
- Contribute to the firm's risk management procedures.
- Provide ad hoc assistance to the Investment & Dealing departments.

Preferred Competencies & Skills

- University graduate with a degree in any field.
- A Level or Scottish Higher (or equivalent) pass in English and Maths
- Excellent attention to detail and ability to work to a high standard of accuracy.
- Strong numerical, analytical and problem-solving skills.
- Organisational skills and the ability to meet deadlines and manage multiple tasks.
- Team-oriented with a proactive and flexible approach.
- Good communication, both written and oral.

Benefits

Salary:	Competitive.
Holidays:	25 days per year; increasing to 30 days depending upon time spent with company.
Pension:	Group personal pension scheme, defined contribution. Company contributes 7% of salary p.a.
Healthcare:	AXA health insurance.
Life Assurance:	Death in Service Cover.
Training:	Training costs and professional qualifications will be covered by the Company.
Flexible working:	Opportunity to work up to 2 of 5 days from home; the firm will provide the equipment necessary for home working.
Volunteering:	Opportunity of paid leave for volunteering and charity work.
Parking:	Free on-site car parking with access to an EV charger.

Application

To apply for this position, please submit your CV and a covering letter to recruitment@mcinroy-wood.co.uk.

In your covering letter, please:

1. Highlight something interesting about yourself.
2. Identify a company that you believe McInroy & Wood should invest in.
3. Briefly explain why it is an attractive investment.

Should you be invited to interview, these will be discussed in more detail.

Closing Date: 10th November 2024

Application

To apply for this position, please submit your CV and a covering letter to recruitment@mcinroy-wood.co.uk.

In your covering letter, please:

1. Highlight something interesting about yourself.
2. Identify a company that you believe McInroy & Wood should invest in.
3. Briefly explain why it is an attractive investment.

Should you be invited to interview, these will be discussed in more detail.

Closing date: 10th November 2024