

McInroy & Wood Limited is an independent private client investment manager based in Haddington, East Lothian. We manage £1.9 billion of client assets invested globally. We value collaboration, high standards and different perspectives.

About the role

Join our Investment Operations team in a role combining data analysis, reporting and automation with hands-on experience of core investment operations. You will use Python to automate processes, improve data quality and develop management information, while building a practical understanding of how an investment management business operates.

You will support accurate and timely operational processes, including regulatory and client reporting. You will also use data from the firm's Investment Data Platform to create useful reporting and help colleagues make informed decisions.

The role may suit a graduate or early career data analyst with practical Python experience and a strong interest in applying data and automation skills within investment operations. Training, mentoring and support for relevant professional qualifications will be provided.

What you'll be doing

Data and reporting

- Analyse client, operational and business data to support internal processes and decision-making.
- Build and maintain firm-wide management information and Power BI dashboards.
- Investigate data discrepancies and improve the accuracy, completeness and reliability of operational reporting.
- Use Python to automate manual processes, improve controls and create repeatable data workflows.

Investment operations

- Deliver key operational processes, including reconciliations, corporate actions, regulatory reporting and client reporting.
- Work with colleagues to ensure data from key systems is accurate, complete and useful for investment activity, operations and reporting.
- Help maintain reliable processes and controls across the Investment Operations function.

Improvement and collaboration

- Understand stakeholder needs and develop practical reporting or automation solutions.
- Explain analysis, reporting logic and technical processes clearly to colleagues with different levels of technical knowledge.
- Contribute data analysis and operational expertise to regulatory change, strategic projects and process improvements.
- Support the development of a strong data culture across McInroy & Wood.

What we are looking for

Essential

- Degree-level education or equivalent relevant experience.
- Strong Python, Excel, numerical and analytical skills.
- Experience of Power BI, SQL or VBA.

- Ability to work accurately with operational and financial data.
- Clear written and verbal communication, including the ability to explain technical information in practical terms.
- Ability to organise competing tasks, meet deadlines and take ownership of your work.
- Interest in investment operations, data, automation and process improvement.

Useful, but not essential

- Experience in financial services, investment operations or a related administrative role.
- Knowledge of investment products, operational processes or the trade lifecycle.
- Experience of identifying process improvements and developing practical reporting solutions.

What we offer

Salary	Competitive.
Annual leave	25 days, increasing with service to a maximum of 30 days.
Pension	7% employer contribution through our group personal pension scheme, with salary exchange available.
Healthcare	Private healthcare insurance.
Life assurance	Four times salary.
Development	Training and relevant professional qualifications funded by the company.
Social commitment	Paid leave for volunteering and charity work.
Workplace	A supportive environment in modern offices, with free on-site parking and access to an electric vehicle charger.
Hybrid working	After completing initial training, you may move to our hybrid working model, with three office days each week.

How to apply

Please send your CV and a covering letter of no more than 500 words explaining your interest in the role and the experience or skills you would bring to recruitment@mcinroy-wood.co.uk.

Please note that we are currently unable to sponsor candidates for this position.

Closing date: 18 October 2026