

McInroy & Wood Limited is a leading independent private client investment manager based in Haddington, East Lothian. We manage £1.9bn of client assets invested globally, and we pride ourselves on our collegiate culture and commitment to building a diverse and high-performing team.

We are seeking a **Data Analyst** to join our Investment Operations function. This role plays a central part in strengthening the firm's data capabilities, supporting operational processes, and enabling data led decision making across the business.

## *Key attributes*

The Data Analyst plays a key role within the Investment Operations team, combining essential operational responsibilities with the development of the firm's data and reporting capabilities. The role ensures accurate and timely delivery of core operational tasks while also supporting the firm's efforts to strengthen its use of data across the business.

A major focus of the role is developing and maintaining management information (MI) and dashboards, particularly using data from the firm's new Investment Data Platform. The Data Analyst will help drive data efficiency, automation, and improved processes across the business, working collaboratively with teams throughout the firm.

Training, mentoring, and support for relevant professional qualifications will be provided.

## *Responsibilities*

- Analysing client, operational, and business data to support internal processes
- Developing and maintaining firmwide MI and dashboards
- Building Power BI dashboards and using Python to automate manual processes and improve data efficiency
- Delivering key operational processes, including reconciliations, corporate actions, regulatory reporting, and client reporting
- Ensuring the smooth running of front office and middle office systems
- Supporting the development of a strong data culture across McInroy & Wood
- Contributing to efficient processes and improved ways of working
- Participating in project work and broader firm-wide initiatives (e.g., regulatory, strategic, and operational improvement projects)

## *Essential Competencies & Skills*

- Undergraduate degree classification of 2:1 or above, in a quantitative discipline e.g. finance, economics, maths, statistics, physics, (predicted if degree not yet complete).
- Proficient in Microsoft Excel.
- Experience using Power BI to build dashboards and reports.
- Understanding of Python (preferred).
- Strong attention to detail and ability to work to a high standard of accuracy.
- Strong numerical, analytical, and problem-solving skills.
- Good organisational skills with the ability to manage multiple tasks and meet deadlines.
- Team worker with proactive and flexible approach.

## *Preferred Competencies & Skills*

- Understanding of financial markets and events.
- Knowledge of optimal database structures.
- Experience using Bloomberg Terminal, Dynamics 365.

## *What we offer*

<b>Salary:</b>	Competitive.
<b>Holidays:</b>	25 days per year, increasing to 30 days depending upon time spent with company.
<b>Pension:</b>	7% employer pension contribution through our group personal pension scheme, with salary exchange available.
<b>Healthcare:</b>	Private healthcare insurance.
<b>Life Assurance:</b>	4x Death in service.
<b>Training:</b>	All training costs and professional qualifications will be covered by the Company.
<b>Social Commitment:</b>	Opportunity of paid leave for volunteering and charity work.
<b>Workplace:</b>	A friendly, supportive environment in bright and modern office premises. Free on-site car parking with access to an EV charger.
<b>Hybrid Working:</b>	Upon completion of training, there is the opportunity to transition to our hybrid working model, requiring 3 days per week in the office.

## *To apply*

Please send your CV and covering letter of no more than 500 words, explaining why you wish to pursue a career with McInroy & Wood to: [recruitment@mcinroy-wood.co.uk](mailto:recruitment@mcinroy-wood.co.uk).

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

**Closing date: Applications close at midnight on Thursday 16 April 2026**