Position Description

College/Division: Finance & Business Services
Faculty/School/Centre: 
Department/Unit: Investment Office
Position Title: Senior Investment Analyst
Classification: ANU SM1 (Administration)
Position No: 
Responsible to: Director Investment Office
Number of positions that report to this role: 1
Delegation(s) Assigned:

PURPOSE STATEMENT:
The Senior Investment Analyst is an integral member of the Investment Office within the Financial Business and Services Division (F&BS). The Senior Investment Analyst contributes and leads the comprehensive management reporting analysis of the University’s investments managed by the Investment Office and the treasury functions executed by the Investment Office. The Senior Investment Analyst has the primary responsibility of coordinating the Investment Office’s contributions to the Finance Committee and providing insightful management reporting, analysis and advice on complex financial issues.

KEY ACCOUNTABILITY AREAS:
Position Dimension & Relationships:
The Senior Investment Analyst is responsible for the coordination and preparation of the Investment Office’s reports to the Finance Committee. The Senior Investment Analyst will also undertake financial modelling and preparing relevant financial analysis to support investment allocation decisions in light of the Strategic Asset Allocation. The Senior Investment Analyst is the primary point-of-contact to University stakeholders invested in the Long Term Investment Pool (LTIP) and will collaborate with schools, colleges and other University organisations dependent upon the Treasury and Investments functions of the Investment Office.

Role Statement:
Under broad direction this position will:
• Coordinate and significantly contribute to the annual expected return for the University’s two investment portfolios including internal budgets, capital expenditure and periodic forecasts including taking a lead role in commentary for presentation to the Finance Committee, Council and other internal stakeholders. This includes assisting with the maintenance and continual improvement of the investment forecasting and financial planning modelling tools, including annual maintenance and data renewal.
• Provide strategic advice to key senior University stakeholders to ensure all foreign currency exposures are reported and that procedures are continuously developed and maintained to ensure they are relevant and adhere to internal and external governance requirements.
• Responsible for the coordination of periodic reports on key financial metrics, targets and financial trends of the University’s investment performance, analysing performance against targets, highlighting and
commenting on unexpected variances

- Identify and analyse complex issues, problems, and opportunities employing a variety of techniques including but not limited to comparing data from multiple sources to draw conclusions, utilising effective approaches for choosing a course of action or appropriate solution and exercising judgement to take action that is consistent with available facts, constraints, and probable consequences.
- Develop complex financial models, providing sound, value-add financial advice as required to support regarding interest rate and foreign exchange risk management.
- Provide effective leadership, management and engagement to the investment office team members, ensuring that all objectives and deadlines are met, supporting their career development and knowledge sharing and managing performance, where needed.
- Oversee the development and maintenance of financial tools supporting the Annual Distributable Amount (ADA) for endowment funds including the variance model, while ensuring all approved applications and redemptions to the LTIP meet policy benchmarks. Maintain the documentation of the tool, LTIP application and redemption decision framework and associated procedures.
- Perform other duties as requested consistent with the classification level of the position and in line with the principle of multi-skilling.
- Comply with all ANU policies and procedures, and in particular those relating to work health and safety and equal opportunity

See the classification descriptors for general staff

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**SELECTION CRITERIA:**

1. Relevant postgraduate qualifications and demonstrated extensive experience in generalist investment experience across multiple asset classes in a complex organisation. Completion or progression towards completion of a Chartered Financial Analyst (CFA) designation is highly desired.
2. Proven high-level financial modelling, reporting and forecasting skills. Demonstrated experience manipulating large datasets from multiple sources.
3. Demonstrated computer skills with experience using online data management systems and proficiency using the MsOffice suite. High-level skills in Excel and experience using Python or R will be highly regarded.
4. High level of interpersonal, liaison and consultation skills with demonstrated effective communication skills and experience developing and analysing comprehensive written documentation and reports, including technical analysis papers, balance sheets, policies and procedures.
5. Demonstrated people management and engagement experience in a culturally diverse environment, with an ability to coach and mentor staff, to prioritise workloads and to lead the team to deliver on challenging objectives in a timely manner and on budget.
6. A demonstrated high level of understanding of equal opportunity principles and occupational health and safety and commitment to their application in a university context.

The ANU conducts background checks on potential employees, and employment in this position is conditional on satisfactory results in accordance with the Background Checking Procedure which sets out the types of checks required by each type of position.

**Supervisor/Delegate Signature:**

**Date:**

**Printed Name:**

**Uni ID:**

References:

For assistance please contact HR Division Ph. 6125 3346
General Staff Classification Descriptors

Academic Minimum Standards