

Job Description

Job Title :	Associate Analyst/Analyst		
Department :	Global Fund Approvals and Research (GFAR) - HSBC Asset Management Risk Team		
Location:	Bangalore		
Relevant Experience	0 – 3 Years	Level	7

Job Description:

We are seeking exceptionally intelligent, resourceful, and self-motivated individuals to be a part of our centralized Mutual Fund Research Team. The Team acts as a 'centre of reference' which resides within the HSBC Global Asset Management (Risk Function) and acts as an independent offshore based research team responsible for providing third party (Non-HSBC) Mutual Fund Approvals globally.

The Research process involves analysis of the Mutual Funds in terms of underlying Investment Process & Philosophy, Fund Management Team, Portfolio Construction & Positioning, Intrinsic Risk Characteristics, Scenario Dependencies, Performance and Volatility Profile.

The individual will be a part of the Global Fund Approvals and Research team based out of Bangalore. Team covers mutual funds in a broad array of global, regional and single country equity and fixed income asset classes like US Equities, European Equities, Chinese Equities, Indian Equities, Investment Grade Bond Funds, High Yield Bond Funds, Property Funds and Money Market Funds etc.

The primary responsibilities include:

- To undertake detailed and rigorous research of mutual funds and prepare quality research reports. The research process will incorporate analysis around the following components.
 - Investment Process & Philosophy
 - Fund Management Team
 - Portfolio Construction & Positioning
 - Intrinsic Risk Characteristics
 - Scenario Dependencies
 - Performance and Volatility Profile
- A critical component of the research process is to conduct telephonic research interviews with portfolio managers of Mutual Funds within the relevant asset class. This will involve
 - The preparation of detailed agendas which are customized as per the asset class and the respective fund
 - Leading and conducting these interviews
 - Assimilating this information with other information sources.
 - Communication skills are very important to make these interviews a two way engaging conversation
- Preparation of mutual fund specific research notes
 - Each analyst will be expected to complete a formal research note consistent with the prevailing quality standards and update the same on a regular basis as the need arises.
- Regular Monitoring and Asset Class Knowledge
 - Each Analyst is expected to regularly monitor the key developments in the economy, mutual fund industry and the asset class to which he/she is aligned.
 - It is critical to analyze the impact of such events on the mutual funds under coverage especially from a risk perspective
 - Over time Analyst is expected to develop good understanding of his/her asset class
- While each analyst will be aligned to a specific asset class, they are expected to exhibit flexibility in supporting their peers and

seniors on other assets classes as and when the need arises.

Analyst must be able to develop clear opinions on mutual funds based on research that goes beyond mere performance and risk evaluation, develop an independent investment thesis based on an informed judgment, and clearly articulate all views and recommendations both in verbal and on written basis internally and externally (as appropriate). Demonstration of a clear understanding of the portfolio, scenario dependencies, underlying risks, expected volatility and factor profile (under different Macro Economic Environments) of the Mutual Funds concerned.

Skills/Experience Required:

- Candidates should be MBA or Masters with Finance specialization. Qualified CFA, FRM or studying for the equivalent would be desirable.
- Candidates with research background would be preferred for this mutual fund research role. Experience working as a Mutual fund research analyst would be of added advantage. Fresh post graduates (MBA Finance or equivalent) with good pedigree can also be considered for the entry level role - 'Associate Analyst'.
- Knowledge of financial markets, macro-economic environment, theory, tools, strategies and portfolio managers.
- Analytical mindset and good report writing skills.
- Attention to detail and an ability to follow a disciplined research process
- Quantitative skills including strong working knowledge of Excel and research tools such as Factiva, Morningstar, Bloomberg
- Good interpersonal skills, especially communication skills (this has particular relevance in relation to the conference calls with portfolio managers that are an important part of the mutual fund due diligence) and the ability to communicate remotely.
- Proactive, positive attitude and ability to multi-task and complete independent written research opinions especially under pressure to meet time sensitive deadlines
- Team player, strong organizational and time management skills, flexible approach to duties and hours of work, client focused.

Interested Candidates, may forward their resume at following email-id:

Contact Person: namrata1.sharma@hsbc.co.in,