

## Fundamental Equity Analyst | Healthcare

**Job Location: Mumbai**

**Experience: 3-5 years**

### Description:

- This is an opportunity to work in a German based asset management manager with AUM of \$100+ mn which invests across asset classes and sectors globally.
- The role involves working in collaboration with a Senior Analyst to support the Portfolio Manager on all aspects of the management of equity portfolios.
- Preparing investment notes, screeners, financial modelling, forecasting, sector databases, finding themes and trends across sectors.
- Liaising with internal stakeholders and end clients, maintaining clear communication of work, as well as willingness to take on additional tasks.
- The Analyst will be measured over and through time on the efficacy of investment recommendations.

### Responsibilities:

- Tracking the sectors and stocks assigned by senior analyst, updating the equity research team and the Portfolio Manager (“PM”) with news and events.
- Supporting the PM/Senior Analysts on various tasks, varying from data gathering, populating data in financial models, preparing sections of reports, and deep-dive secondary research to populate industry/company presentations.
- Maintaining a task list of ongoing/pending tasks on a regular basis, and finalizing task priorities with the Senior Analyst and the PM.
- Regularly communicating with the in-house senior analyst, the equity research team and the PM on project updates and be up-to-date with sector happenings
- Build and maintain company and industry models, financial and value screens. Develop financial models to accurately reflect companies' overall performance and valuation to help make sensible investment decisions.
- Monitor the latest news/developments on the underlying stocks in the portfolio and evaluate the impacts on the stocks using qualitative and quantitative method. Also monitor macroeconomic news.
- Meet with company managements on a frequent basis through on-site company visits, conference calls and meetings in our own office.



### **Skills required:**

- Critical skillset to successfully identify, assess, and communicate investment ideas to the equity research team and the PM.
- Critical thinking about various aspects of the business.
- Strong financial and accounting concepts.
- Proficiency in MS-Excel.
- Strong team player and willingness to take on challenges.
- Excellent verbal, written and communication skills along with strong organizational skills and ability to work well in an international team environment.

### **Academic Qualification – Certifications:**

- The candidate should have CFA (or progress towards it)/MBA with a 3-5 years of experience.
- They should be able to demonstrate solid judgment, intellectual curiosity, and willingness to take a differentiated perspective, for instance through a track record in personal/ professional investments.
- The candidate should possess analytical skills including the ability to organize and synthesize data to reach conclusions.
- Familiarity with equity market databases such as CapitalIQ, ThomsonReuters EIKON will be advantageous.

For a short overview of our firm please have a look at our website. Please address your fully application via Mail to **Mr. Pawan Kaul** | [kaul@lacuna.de](mailto:kaul@lacuna.de).

