

# USMF FOUNDATION

SERVING THE UNIVERSITY SYSTEM OF MARYLAND

## Public Position Description for an Investment Analyst:

<b>Company:</b>	University System of Maryland Foundation, Inc. – Investment Office
<b>Status:</b>	Full-Time Employee
<b>Location:</b>	Dupont Circle, Washington, DC
<b>Experience:</b>	Junior Hire with 0-2 Years of Experience; Preferably at an Investment Consulting Firm, Endowment or Foundation, Family Office, or Equivalent Institution
<b>Education:</b>	Bachelor's Degree
<b>Begin Date:</b>	Immediately

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The University System of Maryland Foundation is seeking an Investment Analyst to assist the USM Foundation Investment Office with a wide range of responsibilities, including data analysis, investment monitoring, capital markets and macroeconomic research, and reporting. The ideal candidate will be qualified, discrete, and demonstrate initiative.

### About the USM Foundation

The USM Foundation got its start in 1979 when it was created to support the five campuses of what was then the University of Maryland. As the University of Maryland expanded from five campuses to thirteen institutions within the University System of Maryland, so did the Foundation. It became the University System of Maryland Foundation, Inc. in 2004, and continued to provide a range of services for its institutions based on their needs, including investment management and fund accounting services.

Today, the USM Foundation has expanded its services to include grants administration, gift administration, and payroll services. In conjunction with the USM Office of Advancement and campus staff, the USM Foundation owns and maintains a database of more than 1.7 million alumni/donor records. Additionally, the USM Foundation works closely with USM Advancement staff to provide a variety of campaign and strategic fundraising leadership support and professional development to all USM institutions and their affiliated foundations.

The USM Foundation serves as the investment manager for the endowments of institutions within the University System of Maryland and other public higher education institutions within the State of Maryland. The Foundation's long-term strategic mission is to provide spendable income to the educational institutions it serves while maintaining the real purchasing power of the corpus and adding growth through appreciation. As of June 30, 2018 the Foundation oversaw approximately \$1.5 billion in long-term endowment assets and short-term funds.

### The Opportunity

The Investment Analyst will perform a variety of functions to support the investment due diligence, monitoring, and reporting processes of the USM Foundation Investment Office. Primarily, the Investment Analyst will be responsible for conducting portfolio analysis using risk and analytical tools, monitoring existing investments, providing capital markets and macroeconomic research, and preparing client and Investment Committee reporting materials. This professional will work closely with the Investment Team, as well as the Investment Office's strategic partners/advisors. Daily responsibilities will include a mixture of ad-hoc, short-term assignments and long-term, self-directed projects.

### Key Responsibilities

- Prepare client school and Investment Committee reports/materials.
- Conduct thorough and meticulous data-driven portfolio and peer analysis, using risk and analytical tools.
- Monitor existing manager positioning and performance.
- Participate in investment manager and advisor calls and meetings.
- Write and distribute manager and advisor meeting notes on a prompt and timely basis.

- Work collaboratively to support the due diligence process on new and existing investments.
- Provide research, analytical, and organizational support to the investment team for projects and ad-hoc requests, including tracking index and security price movements, fundamental valuations, and technical indicators.
- Distribute weekly capital markets report to the team, highlighting market/strategy movements and key developments.
- Oversee preparation of a regularly-distributed report detailing the global macroeconomic environment and capital markets outlook.
- Contribute to the team's asset allocation research efforts.
- Concisely summarize with practicality, relevant quantitative and qualitative top-down and bottom-up data.
- Maintain technical proficiency and learn at an expedited self-directed pace the Investment Office's data analytics software platforms. This includes staying current and knowledgeable in Bloomberg, eVestment, Morningstar, Novus, the Microsoft Office Suite, and other software programs that assist the investment office.
- Serve as an avid reader, staying informed of industry trends and research papers, highlighting areas of interest to the rest of the team.
- Perform and assist in ad-hoc research projects.

Other necessary skills include:

- Exceptional data analysis and written/verbal communication skills.
- Strong time management, organization, team skills, and a meticulous attention to detail.
- Strong propensity and appetite for self-learning and exploration, but not at the detriment of meeting deadlines.
- Ability to work efficiently and independently in a small team atmosphere.
- Self-starter who does not require constant direction; rather, is able to identify where resources are needed and provide that assistance to members of the team.
- Commitment to earning a Chartered Alternative Investment Analyst charter if one is not already obtained.
- Strong Microsoft Office Suite skills.
- Highest level of integrity and professional standards.
- Positive attitude, sense of humor, and interests outside of the workplace appreciated.

### **Qualifications**

The ideal candidate is a hard worker, looking to launch into a career into asset management for a mission driven institution. This candidate should have a strong appreciation for data-driven analytics, a detail-oriented approach to client and Investment Committee reporting, and an ability to synthesize large amounts of information into concise, interesting, and easily-understood formats. While not required, experience from an investment consulting firm, endowment or foundation, family office, or an equivalent institution is preferred.

This professional has a strong intellectual curiosity for capital markets and global macroeconomics. Candidates should be an avid news watcher/reader – in tune with market movements/trends and price levels.

Efficiency in gathering information and a willingness to operate in a proactive manner is essential.

A Bachelor's Degree is required. Having a Chartered Alternative Investment Analyst charter and/or Certificate in Investment Performance Measurement (CIPM) is desirable.

### **How to Apply**

Resumes must be accompanied by a cover letter addressing the candidate's qualifications and interest in the position. Candidates considered for the position will be contacted for interviews.

Please submit applications via e-mail: [resumes@usmd.edu](mailto:resumes@usmd.edu)

Please **do not email** members of the Investment Team.

The University System of Maryland Foundation is an equal opportunity employer.