



**NORTH DAKOTA
CLASS DESCRIPTION**

ND Human Resource Management Services
Phone: (701) 328-3290

Class Code(s): 0560

INVESTMENT ANALYST
(Retirement and Investment Office)
GRADE O

SCOPE OF WORK:

Work involves researching and analyzing investment managers, reviewing and evaluating results, monitoring performance and compliance, making appropriate recommendations, preparing reports, and ensuring that management is provided with data and analysis needed to make prudent investment decisions on pension, insurance, and permanent fund assets.

DUTIES PERFORMED:

- Perform research, analysis, oversight, and risk management work involved in the evaluation, selection, and management of traditional and alternative State Investment Board (SIB) investments as directed by the Chief Investment Officer and Deputy Chief Investment Officer.
- Monitor external investment manager performance for adherence with established parameters for investment type, return, and risk.
- Organize and participate in frequent meetings and calls with existing and prospective investment managers and maintain appropriate due diligence records of such interactions.
- Perform research projects on new investment opportunities that would add value to SIB portfolios and monitor progress toward completion of projects; recommend actions to the Chief Investment Officer and Deputy Chief Investment Officer as a result of such research.
- Gather information on potential investment opportunities from a variety of sources, analyze their value and risk, and determine their consistency with established investment objectives and criteria.
- Develop, maintain, and publish information relating to current market conditions and trends in the principles and practices of institutional investment management.
- Prepare a variety of written, statistical, and financial reports for management, SIB, SIB sub-committees, clients, Legislative Assembly, interest groups, and the public regarding research results and projects' progress.
- Prepare quantitative and qualitative analyses with respect to investment related issues and maintain investment databases and prepare spreadsheets and other presentations on investment information.

NOTE: The duties listed are not intended to be all-inclusive. Duties assigned any individual employee are at the discretion of the appointing authority.

MINIMUM QUALIFICATIONS:

Requires a bachelor's degree in economics, finance, accounting, or business (with an emphasis in investments, economics, finance, accounting or real estate), or a closely related field from an accredited college or university and five years of progressively responsible investment analysis experience for a public agency or a private corporation or entity having a major investment management program. Note: Equivalent combinations of education and experience may also be considered. An in-depth understanding of investment vehicles, portfolio theory, capital markets and the investment process. A high degree of proficiency with Windows-based software for spreadsheets, word processing, database management, and investment-related software.

Eff. Date: 6/2014