

JOB DESCRIPTION

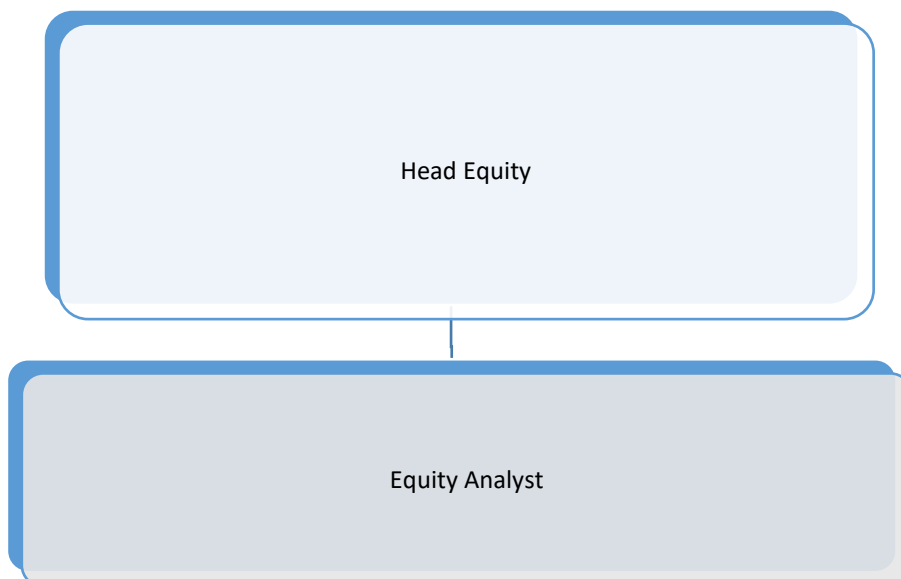
Role Title	Equity Analyst
Employee Interviewed	
Reports To	Head of Equity
Band	GB05
Company	Bajaj Holdings and Investment Limited
Location	Mumbai
Function/ Department	Investment
Written By	Shailesh Dhamankar/Purav Jhaveri
Approved By (Jobholder)	< To be added after validation >
Approved By (Immediate Superior)	< To be added after validation >
Date (written on)	April 05, 2024

1. JOB PURPOSE

(Summarize in one statement why the job exists; and how it contributes to the overall objective of the company)

This is a critical role within the Investment department. The role is responsible for research and tracking the stocks in the decided sectors and provide recommendations to the HOE/CIO. The role demands to stay up to date on all related company/sector news to help HOE and CIO to make informed decisions.

2. ORGANISATIONAL CHART



- Numerical figure represents the total number of incumbents in the role

PRINCIPAL ACCOUNTABILITIES

- To conduct research, create company reports, analyze financial information, and make predictions regarding financial matters, and recommend for investment. Primary sectors- Mid & Small Cap, BFSI & IT
- Create and maintain earnings, valuation models for covered stocks
- Analyze data to identify emerging opportunities and risks, with reasoning
- Build relationships with investor relations teams of portfolio companies
- Maintain sector model portfolios
- To ensure timely monthly, quarterly, half yearly and annual report generations

3. MAJOR CHALLENGES

- Timely stock recommendations.
- Timely delivery of reports

4. DECISIONS

- None.

5. INTERACTIONS

Internal Clients

Roles you need to interact with inside the organization to enable success in your day to day work

- Will need to engage with the the HoE/CIO and IC members

External Clients

Roles you need to interact with outside the organization to enable success in your day-to-day work

- Sell side Brokers (Analysts)
- Buy side research

6. DIMENSIONS

Financial Dimensions

(These should be quantifiable numerical amounts)

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7. SKILLS AND KNOWLEDGE

Educational Qualifications

a) Qualifications

- Post Graduate in Management/CA, CFA is a plus
- Advanced MS office skills preferred:
 - Word
 - Excel: Forms, Formulas, Functions, Pivot Tables, Macros, Graphs, visual Basic
 - PowerPoint: Graphics

b) Work Experience

- Minimum 7-8 years of relevant experience-Buy Side preferred
- A detailed oriented self-starter with prior experience in the equity research

Skills and abilities

- Profound understanding of equity markets on a global level. In addition, a deep understanding of fundamental analysis, financial modeling, and strategy research
- Strong analytical and communications (verbal and written) skills
- Hands on working on Information Portals (Bloomberg, Capitaline etc)
- Ability to operate independently
- Good attention to detail
- Ability to maintain confidentiality
- Problem solving and decision-making - develop solutions to a variety of complex problems