Client Associates
Private Wealth Management

Job Title: Investment Research Analyst

Department: Core Investment & Research Advisory
Location: Gurgaon, IN
Type: Full-Time
Reports To: Head of Investment Research

About Us:

Founded in 2002, **Client Associates (CA)** is India's first and largest *Multi-Family Office*, committed to helping successful families manage, grow, and transition their wealth across generations. Built on the pillars of integrity, independence, and unwavering client focus, CA partners with UHNI and HNI families through a highly personalized and research-led approach to wealth stewardship.

Over the last 23+ years of its journey CA has grown to advice more than 1300+ wealthy families of India owning assets worth a few billion USD (~7 billion USD currently). Client Associates is recognized by private clients and the industry at large as not only the Pioneers of Family Office in India but also as one of the "Best Team of Private Bankers" in India.

Position Summary:

We are seeking a highly motivated and detail-oriented Investment Research Analyst to join our Core Investment Research Team. The ideal candidate will possess strong analytical capabilities, a deep understanding of capital markets, and the ability to produce actionable insights across various sectors and asset classes. This role requires close collaboration with portfolio managers, relationship managers, and external research providers.

Key Responsibilities:

- Conduct in-depth **macroeconomic and capital market research**, including tracking trends in equities, fixed income, commodities, and alternative assets.
- Perform **sectoral and company-specific analysis** to identify investment opportunities and risks.
- Develop and present **investment research reports**, thematic notes, and white papers for internal and client-facing use.
- Assist in **manager and product due diligence**, including qualitative and quantitative assessments.
- Monitor and summarize economic data releases, and regulatory developments.
- Support the development of the firm's **house view** on markets, sectors, and asset allocation.

- Collaborate with the portfolio management team in **idea generation**, **risk assessment**, and **portfolio construction**.
- Understanding of **private equity / venture capital space**.
- Utilize tools such as **Bloomberg, FactSet, Capital IQ, and Excel VBA** to support analysis and reporting.

Qualifications:

- Bachelor's degree in finance, economics, accounting, or a related field; advanced degree or **CFA designation** (or working toward it) preferred.
- 2–5 years of relevant experience in investment research, equity analysis, or financial services.
- Strong understanding of **financial markets, instruments, and valuation techniques**.
- Excellent analytical, problem-solving, and **quantitative modelling** skills.
- Proficiency in Excel, PowerPoint, and financial databases (e.g., Bloomberg, FactSet).
- Strong **written and verbal communication** skills; ability to distil complex information into clear insights.
- High attention to detail, organizational skills, and the ability to manage multiple tasks under tight deadlines.
- Team-oriented mindset with the ability to work collaboratively in a fast-paced environment.

What We Offer:

- Competitive compensation and benefits
- Exposure to high-calibre clients and investment professionals
- Learning and development opportunities including training and certifications
- A collaborative and intellectually engaging work culture

To Apply:
Please submit your resume and a brief cover letter outlining your relevant experience and email to tanushreemishra@clientassociates.com