



Title: Investment Fund Analyst
Department: Investment Fund Analysts Team
Reporting To: Associate director - Investment Fund Analyst
Location: Gurgaon, India

We're proud to have been helping our clients build better financial futures for over 50 years. How have we achieved this? By working together - and supporting each other - all over the world. So, join our team and feel like you're part of something bigger.

Department Description

The Investment Fund Analysts team in India is an integral part of the Investment Directing teams (Equities, Fixed income and Multi Asset) based in London, Japan, Hong Kong and Canada. The Investment Fund Analysts in India works closely with the Investment Directing teams in overseas offices and the role involves supporting Investment Directors in generating baseline investment communication material for Fidelity funds. This includes market reviews, fund analysis/performance & strategy commentaries for client reports, and fund presentation updates – all aimed to help in asset gathering and asset retention. The role is integral to the successful functioning of each product franchise.

The Investment Fund Analysts will be required to update/produce sales materials such as standard product presentations in order to enable our distribution teams to provide their clients and prospects with an informed view of the investment process behind each fund, along with explanations of current fund performance and positioning. It will also be the responsibility of the individual to provide a quick and relevant response to client queries on funds using existing material or information sourced from elsewhere in the company.

This role is for supporting the Investment Specialists/ Investment Directing team for equities.

Key Responsibilities

- Produce market reviews and investment outlook pieces
- Ability to think from a customer viewpoint and deliver timely, accurate and insightful communication on Fidelity funds. This will require a detailed knowledge of each manager's investment process, recent performance and portfolio positioning
- Write monthly, quarterly and annual client reports, as well as statutory annual and semi-annual reports, tailoring the output to each specific template
- Present data in understandable format for sales teams
- Ensure all standard product content for Fidelity products is produced on time and to the appropriate quality standards
- Address ad hoc data related queries on funds
- Accurate collation and generation of presentations using a variety of media
- Develop an understanding of the sales process
- Support in automation of information provided to customer services teams

Skills/Qualifications and experience

- Masters Degree – economics/business/finance
- CFA qualification would be advantageous
- 4+ years relevant experience in security analysis / investment/research related role
- Good knowledge of the equity markets and key macroeconomic indicators
- Good writing skills with attention to detail
- Competent at analysing fund-related data
- Familiarity with databases like DataStream and Bloomberg required
- Proficiency with Excel, PowerPoint and VBA
- Strong communicator and an ability to communicate with all levels of the organisation including stakeholders in global locations
- Ability to work to tight deadlines and manage multiple priorities



Feel
Fidelity

- Self motivated and resilient
- Strong team player
- Excellent problem-solving skills and an inclination for going beyond immediate deliverables and understanding the business environment in order to effect improvements
- Proactive approach and a 'Can-do' attitude

Feel rewarded

For starters, we'll offer you a comprehensive benefits package. We'll value your wellbeing and support your development. And we'll be as flexible as we can about where and when you work – finding a balance that works for all of us. It's all part of our commitment to making you feel motivated by the work you do and happy to be part of our team. For more about our work, our approach to dynamic working and how you could build your future here, visit careers.fidelityinternational.com.

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