



We are seeking a talented individual to join our investments team at Mercer, a Marsh Business. This role will be based in Gurgaon. This is a hybrid role that has a requirement of working at least three days a week in the office.

Lead Specialist/ Manager - Investments (CSO)

As a member of the Investments team at Mercer based in India, you will play a crucial role in providing comprehensive analysis and research support throughout the entire investment decision-making, risk management, and investment monitoring process. Your primary responsibilities will involve assisting with a range of institutional investing activities across different geographies, including collecting and analyzing data, researching investment strategies, portfolio construction and performance analytics reports.

In your role, you will be the content specialist/trainer and peer reviewer of crucial tasks including but not limited to quarterly performance evaluation reports including Defined Contribution, Defined Benefit and Not for Profit clients, investment policy statements, and manager commentaries among other tasks. You will be expected to drive/lead ad hoc projects aimed at creating positive business impact/value-add for the business.

This is a challenging and rewarding opportunity for a highly motivated individual with a passion for investments, strong analytical skills, and a desire to work in a dynamic, collaborative team environment.

We will count on you for:

- Developing asset allocation solutions for institutional clients based on the Investment Policy Statement while incorporating the asset class views of the organization's Strategic Research Group
- Preparing Portfolio evaluation reports (DC, DB, OCIO, Endowment and Foundation) on monthly/quarterly basis detailing the market performance, investment results, style exposures and recommendations for portfolio rebalancing.
- Preparing and reviewing quarterly manager commentary by assessing the performance of fund/investment strategies and linking the performance with market/economic developments and the investment process of the asset managers.
- Lead and support client projects or ad-hoc projects beyond reporting
- Review asset allocation and portfolio construction as per client goals and risk appetite
- Review and amend investment policy statements
- Fund managers screening and preparation of search report
- Project management, peer review, process training and development of team members
- Lead and contribute on projects for Strategic Research Team and Intellectual Capital publications
- Conduct research and write research papers on macro/micro economic environment and Investment industry
- Lead and participate in knowledge development initiatives
- Providing research support on client requests including ESG, Style Analysis, Asset Class Trends
- Play key role in strategic and operations improvement initiatives
- Support Process Leads in preparation of periodic KPIs and dashboard reporting
- Coach and guide the junior team members and new team members

What you need to have:

- 5-7 years' experience in the wealth management/investment industry overall
- Relevant Bachelor's or Master's degree in finance or economics with demonstrated academic achievement
- Progress towards professional certification such as CFA, CAIA, CIPM
- Proficient understanding in Wealth Management, Investment Management industry and asset classes (equity, fixed income and alternatives)
- Strong logical and analytical skills with attention to details

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- Strong working knowledge of MS Office, third party tools – Bloomberg, Morning Star, Lipper, etc
- Excellent written and verbal communication
- Exceptional interpersonal, organizational, business communication, and time management skills
- Demonstrated success working with out-of-country professionals
- Ability to multitask, manage multiple priorities and work in a rapidly changing and dynamic environment, ensuring standards and deadlines are met and keeping others informed and up-to-date
- Stakeholder management; managing escalations and ensuring excellent service delivery

What makes you stand out?

- Ability to understand the link between data, client needs and its application to the “bigger picture”
- Excellent client management skills
- Positive attitude & ability to adapt ever-changing environment
- Strong multi-tasking skills
- Domain expertise relevant to wealth management/investment advisory/consulting
- Willing to learn and a strong team player with a collaborative approach
- Effective team management skills
- Good analytical skills
- Strong written and verbal communication skills

Why join our team:

- We help you be your best through professional development opportunities, interesting work and supportive leaders.
- We foster a vibrant and inclusive culture where you can work with talented colleagues to create new solutions and have impact for colleagues, clients and communities.
- Our scale enables us to provide a range of career opportunities, as well as benefits and rewards to enhance your well-being.

Mercer is a business of Marsh (NYSE: MRSB), a global leader in risk, reinsurance and capital, people and investments, and management consulting, advising clients in 130 countries. With annual revenue of over \$24 billion and more than 90,000 colleagues, Marsh helps build the confidence to thrive through the power of perspective. For more information about Mercer, visit [mercerc.com](https://www.mercer.com), or follow us on LinkedIn and X.

Marsh is committed to embracing a diverse, inclusive and flexible work environment. We aim to attract and retain the best people and embrace diversity of age, background, caste, disability, ethnic origin, family duties, gender orientation or expression, gender reassignment, marital status, nationality, parental status, personal or social status, political affiliation, race, religion and beliefs, sex/gender, sexual orientation or expression, skin color, or any other characteristic protected by applicable law.

Marsh is committed to hybrid work, which includes the flexibility of working remotely and the collaboration, connections and professional development benefits of working together in the office. All Marsh colleagues are expected to be in their local office or working onsite with clients at least three days per week. Office-based teams will identify at least one “anchor day” per week on which their full team will be together in person

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