

# MARSH

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

## **Senior 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 this role, you will work closely with the Investment Consultants to deliver high-quality research and analysis to support their client engagements. Your ability to gather and analyze complex investment data, synthesize insights, and communicate findings will be critical to the success of the team and the clients we serve.

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 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
- Making recommendations to clients basis the manager search and selection for various investment strategies – US and Global Equity, Fixed Income, Multi-Asset, Inflation, Real Estate, and ESG which involves assessment of strategies on various factors such as the investment team, investment process, risk management, factor/style exposures (using Style Analytics), and fees
- Review and amend investment policy statements.
- Author research papers on macro/micro economic environment and Investment industry trends.
- Providing research support on client requests including ESG, Style Analysis, Asset Class Trends
- Lead and manage end-to-end operations and ensure the seamless delivery of reports/projects.

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- Project management, work allocation, real-time capacity management, peer review, training and development of team members
- Liaison with stakeholders to build relationship for service delivery management.
- Play anchor role for all strategic projects and provide directions to the team.
- Prepare and manage KPIs and handle escalations.
- Participate in defining strategic priorities for the business.
- Focus on new capability development and branding imperatives.
- Lead efforts for people engagement, knowledge development initiatives for the team, and ensure adherence to compliance policy and organizational imperatives.
- Driving Process Improvement Initiatives and delivering results in line with Business Priorities

## **What you need to have:**

- 8+ Years of relevant experience
- Relevant bachelor's or master's degree in finance or economics with demonstrated academic achievement.
- Prior experience in asset management or financial services, preferably across multiple asset classes and investment disciplines; at least
- Proficient understanding of Wealth Management, Investment Management industry and asset classes (equity, fixed income, and alternatives)
- Minimum experience of at least 6 years in the financial services industry
- Ability to understand the link between data, client needs and its application to the "bigger picture."
- Proven organizational and project management skills, including the ability to manage multiple stakeholders.
- Excellent written and verbal communication skills, capable of influencing diverse audiences.
- High level of self-motivation, ownership, initiative, and exceptional attention to detail.
- Exceptional interpersonal, organizational, business communication, and time management skills.
- Leadership skills with the ability to manage diverse teams.
- Strong logical and analytical skills with attention to details
- Demonstrated high level of self-motivation, ownership, and initiative.
- Working knowledge of MS Office and third-party tools such as Bloomberg, Morning Star, and Lipper.
- Progress towards professional certification such as CFA, CAIA, CIPM

## **What makes you stand out?**

- Domain expertise relevant to wealth management/investment advisory/consulting
- Willing to learn and a strong team player with a collaborative approach.

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- Effective team management skills
- Good analytical 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 regardless of their sex/gender, marital or parental status, ethnic origin, nationality, age, background, disability, sexual orientation, caste, gender identity 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 McLennan 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.