

## **Investment Fund Analyst**

Brompton Funds is a leading independent manager of investment products that provide access to unique investment strategies across a broad range of asset classes. We currently manage approximately \$2.0 billion in client assets, primarily in TSX-listed closed-end funds and ETFs. Our clients know us for our fairness and integrity in dealing with the investing public, our depth of knowledge in our product area, our attention to client service and our focus on investment performance.

The successful candidate will play a key role in the growth of our existing and new ETFs and Closed-End Funds by conducting research and analysis, and by providing support for our team's Marketing and Investor Relations efforts. We are looking for a candidate that is self-motivated, energetic, a highly disciplined team player and has a strong work ethic. Job title will be dependent on experience.

### **Position Overview**

#### *Product Analysis*

- Prepare fund comparison, ranking, and portfolio analysis reports in Morningstar Direct to highlight Brompton ETF performance and differentiated features versus competitive product, and to illustrate to IAs the positive impact of including a Brompton product in their client's portfolios, supporting the sales team & the sales process
- Prepare and maintain a weekly fund flows report for Management team
- Propose new ideas for website content for all Brompton Funds, and assist the team in keeping existing website current.
- Assist with preparation and maintenance/updating of marketing materials for Brompton's products, including presentations, investment advisor materials, etc.
- Stay current by researching developments in the ETF / Investment Management industry; source ideas to develop in-depth "white-paper" or simplified "client-friendly" content for Brompton's website.
- Provide insights and assist in the planning and preparation of email marketing campaigns for existing funds and new product launches
- Assist as required in the organization of roadshow events – lunches and cocktails, including travel arrangements

#### *Product Development*

- Research and analyze data to develop investment themes to support existing product and new product launches
- Work with Portfolio Managers and Management team to research and develop content for sales and marketing campaigns
- Analyze competitive landscape for existing products and new product ideas; provide input into new product features that may improve or differentiate Brompton new products (ETFs & CEFs) compared to competitive products.
- Assist in the evaluation and implementation of new product initiatives
- Assist in special ad hoc projects as required

### *Investor Relations*

- Assist sales staff in servicing investment advisor requests by providing one-off comments and analysis as required
- Provide support to sales staff with product-related analysis and commentary for escalated investor queries
- Liaise with the investor and analyst community to obtain market intelligence as required
- Work with data providers to ensure Brompton ETFs and other investment funds have accurate data dissemination

### **Desired Skills and Experience**

- BComm, CFA, or other similar education, training or work-related experience
- Minimum 2 years work experience in financial services preferred
- Working knowledge of investment principals and investment funds
- Excellent written and verbal communication skills and networking abilities
- Strong research and analytical skills
- Proficiency in Microsoft Office programs, especially Microsoft Excel and Powerpoint
- Working knowledge of Morningstar Direct and Thomson Reuters Eikon/Datastream or similar data system
- Strong organizational skills and ability to multi-task or manage multiple projects and deliver to a tight deadline

### **Location: Downtown Toronto (Bay Street)**

### **Position to be filled immediately**

### **Instructions to applicants:**

- Submit resume to [resumes@bromptongroup.com](mailto:resumes@bromptongroup.com)

Brompton welcomes applications from people with disabilities. Accommodations are available upon request for candidates taking part in all aspects of the selection process.

You will only be contacted if you have been selected for an interview.