

Job Title: Investment Product Analyst  
Salary:  
Regulatory Status: Progression to Certified Role  
Hours of work: Monday – Friday 09.00 – 17.00 hrs  
Location: Bolton/Lichfield  
Holiday entitlement: 25 days plus statutory bank holidays  
Other entitlements: See benefits list and group information document

Marlborough is a rapidly growing investment group that manages more than £9.5 billion for over 200,000 clients and employs some of the UK's most respected fund managers. The group has its headquarters in Bolton and offices in London, Staffordshire, Cambridgeshire, Guernsey, and Dublin.

The companies in the group – Marlborough Fund Managers, Marlborough Investment Management, Marlborough International, Investment Fund Services Limited (IFSL) and IFSL International – employ more than 180 people.

Marlborough's success has been built on a reputation for excellence in active fund management, with the group leading the way in industry expertise, service quality, product understanding and added value for our investors.

As we continue with our ambitious growth plans, we are looking for talented financial services professionals who share our values and can help us ensure they remain at the heart of the business. That means putting our investors at the forefront of everything we do and constantly striving for excellence in the service we deliver.

In addition to receiving a comprehensive benefits package, successful candidates will join a team who are committed to collaborative working in an environment where personal and professional development are genuinely valued.

#### Role Purpose

#### Key Responsibilities

A good, demonstrable understanding of derivative strategies (equity, index and currency) is essential. The successful candidate will work across teams to develop new products and ensure the business is able to effectively manage and oversee its investments within the set risk appetite.

To analyse and report on new and existing investment strategies designed and managed by our in house and externally appointed investment managers. The ideal candidate will outside of derivatives also have a good understanding of a broad range of investment strategies as utilised by FCA regulated funds.

Ensure effective product governance measures are taken and that good investor outcomes are central to the design and running of investment product portfolios.

To advise product, risk and operational units on derivative investment strategies and their implementation as SME alongside our growing investment team.

Reports directly to the Group CIO and will consult with, present to and liaise with stakeholders across our organisation and externally.

Must have experience running, overseeing, or analysing investment strategies that utilise derivatives, equities, fixed interest and multi asset.

#### Key Responsibilities:

- Analyse investment product portfolios and strategies.

- Act as investment portfolio SME to assist business units across the group in the development and oversight of fund portfolios.
- Promote good product governance and our objective to achieve good investor outcomes from our investment products.
- Assist and advise operational and oversight teams as they manage valuation, risk monitoring and general oversight.
- Liaise with internal and external investment managers to design, stress test, back test and create portfolios for new or developing funds.
- Report management information to the investment and product governance committees.

## Secondary Responsibilities

- Keep up to date with regulatory and industry changes and analyse their impact on our investment products.
- To assist the CIO with projects, investment research, creating presentations and spreadsheets;
- Take part in industry committees and events to keep abreast of market developments, themes and emerging risks and opportunities.
- Produce presentations as required;
- Carrying out any other appropriate duties as requested by the CIO

## Standards

- Maintain high levels of personal development
- Comply with the FCA Rules and Regulations and all other industry rules, regulations and guidance;
- Be committed to the up-keep and use of company policies and procedures;
- Behaviours should be as set out in the company handbook and culture, mission and strategy documents;

	Essential	Beneficial
Skills	<p>A strong understanding of portfolio management generally.</p> <p>A good, demonstrable understanding of derivative strategies encompassing equities, indices, and currencies.</p> <p>Excellent analytical skills and familiarity with various investment tools and systems.</p>	<p>Ability to use Bloomberg, Morningstar, StatPro and FE systems.</p>
Qualifications	<p>Educated to degree level (or equivalent) or able to demonstrate equivalent level of experience.</p> <p>IMC or equivalent, recognised Level 4 qualification delivering threshold competency for investment management and front office professionals.</p>	<p>CFA</p>
Experience	<p>Investment management experience in a portfolio management, analysis, or oversight role.</p>	<p>Previous certificated investment role.</p> <p>Familiarity with the FCA PROD, COLL and COBS rules</p>
Personal Qualities	<p>Confident and articulate communicator</p> <p>Collaborative approach</p>	

In agreeing to this job description, the incumbent accepts the description of reporting lines, status, role, responsibilities, and associated accountabilities. As these details may change throughout the year minor adjustments do not require a new job description to be completed.

Job descriptions should be reviewed annually as part of the PDR process and any updates should be agreed with HR. Material regulatory changes to the above outlined role must be agreed and an updated version of this document should be sent to HR for filing.

Please take time to look at the link below for further details regarding Marlborough Fund Managers Limited.

[www.marlboroughfunds.com](http://www.marlboroughfunds.com)