

State Investment Officer – Internal Public Equity

Position Summary:

In collaboration with the internal public equity investment team, this position will conduct research and analysis of public equity securities, assist in the research, development and evaluation of public equity security selection models, and make public equity security buy, hold, and sell recommendations. The position will also assist the internal public equity investment team in the research, evaluation, and monitoring of investment strategies. Specific duties are outlined below.

The successful candidate will be expected to become a CFA Charterholder. This is a major commitment. More information about this program can be found at <http://www.cfainstitute.org>.

Regular Duties:

1. Utilize investment and custody related software

- Bloomberg
- My State Street
- Callan Portfolio Evaluation Program (PEP)
- FactSet
- Zacks Investment Research
- Microsoft Excel and customized analysis tools developed using Excel

2. Public equity and capital markets research

- Research and analyze data related to public equity security selection
- Research and analyze capital market data
- Monitor and evaluate current events and their impact on public equity investments and the capital market environment
- Research, test, and implement investment strategies

3. Portfolio management and monitoring of internally managed public equity portfolios

- Monitor and evaluate equity broker trade execution
- Analyze equity sectors, industries, and securities and make recommendations for portfolio selection
- Assist in the management of equity portfolios for compliance with portfolio strategy and equity guidelines
- Monitor, analyze, and vote equity proxy ballots per policy and guidelines
- Monitor, analyze, and make recommendations regarding corporate actions and company events per policy and guidelines
- Provide assistance in generating reports and communicating internally managed investment portfolio performance and characteristics
- Actively participate in team meetings and discussions

4. Generate reports for internal and external presentation

- Compile data into an organized format for presentation

- Provide assistance in documenting investment performance and attribution
- Organize and review documents and reports

Required Education:

- Bachelor's degree in Capital Markets, Finance, Economics, Accounting, Business, Statistics, Natural Sciences or related field of study

Preferred Qualifications:

- Experience developing and analyzing mathematical and statistical models
- Proficient with Microsoft Office applications
- Experience with Bloomberg, FactSet, Crystal Ball, or other investment/statistical software packages
- Experience investing public equity securities
- Team orientated with excellent verbal and written communication skills
- Self-starter and inquisitive with a desire to independently research and develop ideas

How to Apply:

Cover letter, resume and professional references may be submitted to:

Chief Investment Officer
Treasury Division
Portfolio Management Section
P.O. Box 110405
Juneau, AK 99811-0405

Or FAX: 907-465-4397

Or EMAIL: molly.mccafferty@alaska.gov