

UCLA Investment Company

JOB DESCRIPTION

Position: Investment Analyst (1st Year)	Team: Investments
Position type: Limited-term, full-time, exempt	Pay Range: \$70,000-\$80,000

UCLA Investment Company:

The UCLA Investment Company was established in 2011 and oversees the endowment of the UCLA Foundation. The portfolio is a global, multi-asset class portfolio. The purpose of the endowment is to support the educational mission of UCLA by providing a reliable source of funds for current and future use. The UCLA Foundation promotes philanthropy and manages resources to advance the campus mission of teaching, research, and public service.

Investment Analyst Overview:

The Investment Analyst will support the mission of the Investment Company by ensuring the endowment is invested in a manner that both (i) provides steady funding for the university and (ii) preserves the real value. The Investment Analyst will be responsible for (i) data tracking and management, (ii) assisting with the identification, selection, and monitoring of external investment managers, (iii) analyzing performance, and (iv) contributing to all other aspects of endowment management.

The 1st Year Investment Analyst will be a generalist and cover multiple strategies in the portfolio, including Public Equity, Fixed Income, Private Credit, Private Equity, Venture Capital, and Real Assets investments. The Investment Analyst will support and report to the senior investment team. Progress toward obtainment of the CFA designation is expected.

This position is based in Los Angeles, CA. We are a hybrid workplace with three days working in the office and two days working from home. A starting date between October 2023 and March 2024 is strongly preferred. The Investment Analyst will be part of a 3-year rotational program and will spend a year across each of (1) Public Equity & Credit, (2) Venture Capital, and (3) Private Equity and Real Assets. This is a term position with an end date of June 30, 2027.

Responsibilities:

- **Data Management** – inputting, organizing, and managing data from existing and prospective managers, as well as for various markets, investment strategies, sectors, and geographies, using Bloomberg and various internal applications.
- **Board Reporting** – assisting in the creation and review of regular and ad-hoc materials for The UCLA Investment Company and Foundation Board of Directors.
- **Exposure Monitoring** – aggregating, analyzing, and maintaining detailed position-level data for all underlying holdings in manager portfolios across public and private asset classes and producing quarterly geographic, sector, and strategy exposure reporting packages.
- **Portfolio Analysis** – working with the operations and investment team on the critical tools and

analysis that support performance assessment and attribution, asset allocation, liquidity management, and risk management.

- **Manager Due Diligence** – playing a key role in the team’s investment and operational due diligence of potential investments, assisting with note-taking, composing investment memoranda, and subscription document preparation.
- **Manager Monitoring** – helping oversee existing manager relationships by partaking in regular manager updates and regularly assessing results through performance and attribution analysis, as well as evaluation of underlying investments.
- **Special Projects** – leading special projects related to various markets, investment strategies, sectors, and geographies.

Experience and Qualifications:

- Unimpeachable ethics with the highest level of integrity, discretion, and commitment
- Minimum of a Bachelor’s degree with a track record of outstanding academic achievement
- Progress toward the CFA designation is preferred
- 0 to 3 years of prior work experience in a highly analytical role (applicable roles include asset management, consulting, corporate/project finance, accounting, or banking)
- Strong aptitude using Microsoft Excel and preferably working knowledge of financial software packages (e.g., Bloomberg Terminal)
- Familiarity with basic financial calculations and statistical concepts, as well as a working understanding of financial statements
- Superior ability for effective time management and meeting deadlines, multi-tasking, and working well under pressure
- Superior analytical and quantitative skills, coupled with good judgment and qualitative insight
- Responsiveness, excellent communication and listening skills, with the ability to function well as part of a small team
- Ability to take initiative and work independently to drive various projects
- Willingness to travel as needed
- Interest in investing of all sorts

UCLA Investment Company is an equal-opportunity employer and welcomes a diverse candidate pool.

To Apply:

Eligible candidates should submit their resume and cover letter via email to information@uclainvestments.org with a subject line as follows: “*UCLA IC Investment Analyst (Year 1) 2023.*” Please include within your cover letter a description of your investment philosophy and how your experiences have shaped it. Candidates whose qualifications fit the criteria for the job will be contacted.