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| <b>Job Title</b>     | Senior Investment Officer – Equities |
| <b>Grade</b>         | 3B                                   |
| <b>Reports to</b>    | Manager Equities                     |
| <b>Business Unit</b> | Investments                          |
| <b>Location</b>      | HQ                                   |

## Overview

Assess the performance of Local Equity Investments following approved policies to maximize risk adjusted returns.

Identify value enhancement opportunities in the existing local equity investments of the Fund and prepare recommendation papers identifying the opportunities and action plan.

## Duties and responsibilities

### 1. Active Management and Assessment

- Prepare and Review Investment Committee Reports as and when required;
- Prepare and review impairment testing of all investee companies annually;
- Meet with Investee Companies' representatives for business insights and strategies moving forward;
- Analyse performance of investment portfolio and business trends;
- Build and review financial models to formulate analysis reports and facilitate internal/external business valuations;
- Identify opportunities for rehabilitation of non-performing investments and prepare necessary recommendation papers;
- Review Local Investee Company analysis reports;
- Assist the team in the external valuation exercises
- Research and analyse industries, companies, historical financial statements and project financial forecasts;
- Assisting in the management and execution of due diligence processes.

### 2. Value Enhancement

- Identify profit enhancement opportunities in current investee companies and prepare recommendation papers, including detailed analysis of the opportunity from a long term cost – benefit perspective with action plan and timeline;
- Improve financial status of investments, identifying trends and recommend action plan;
- Recommend buy, sell or hold options for the existing local equities portfolio;
- Identify synergies across Investment class or sector to enhance profit and risk reduction (mitigation).

### **3. Internal Reporting**

- Review monthly reports for local and offshore investments;
- Prepare and review reports and presentations for Board Investment Committee;
- Provide daily analysis of market movements and prepare desktop reports;
- Prepare and review Investment Committee reports as and when required;
- Assist in the formulation of the Annual Budget/ Dividend Forecast of the Equities Unit
  
- Prepare and review quarterly dashboard report by Sector for BIC;
- Collate and maintain Subsidiaries Board papers and minute.

### **4. Administrative**

- Attend Annual General Meeting on companies and filling proxies for AGM meeting.
- Assist in Tender Evaluation for consultancy services, projects and others within Investments;
- Manage and update soft and hard copy filings of investee companies' information, acquisitions documents and ownership rights;
- Assist in carrying out payments for local equities related projects;
- Assist in the administration work for local equities related projects.

**5.** Perform any other duties as assigned by the Manager.

#### **Education & Experience:**

- Degree in Accounting, Banking and Finance, Economics, or related field;
- At least 3 years' experience in a similar field.
- Professional membership of Investment or Financial Institute is desirable.

#### **Knowledge & Competencies Required:**

- Strong communication, analytical and data organization/ interpretation skills.
- Proven ability to multi-task, work under pressure, and meet tight deadlines.
- Attention to detail and accuracy is required.
- Superior skills with Microsoft Office applications (Excel, PowerPoint, Word, Outlook).
- Reporting Skills, Informing Others, Financial Skills, Forecasting, Corporate Finance, Financial Diagnosis, Financial Software, Analyzing Information, Statistical Analysis, Process Improvement, Financial Planning and Strategy.
- Financial modeling experience and understanding of financial statements and instruments.
- Understanding of Securities and Fund Services Product Offerings is a plus.
- Understanding and familiarity with Thomson Reuters is a plus

#### **Reporting Structure**

*Direct Reports:* Investment Officer Equities (x1)

*Indirect Reports:* None

## **Authority Levels**

*Financial:* None

*Staff:* None

*Contractual:* None

## **Internal & External Contacts**

*Internal Contact*

- *All Departments*

*External Contacts*

- Members
- Reserve Bank of Fiji
- Ministry of Economy
- Ministry of Public Enterprise, Infrastructure & Trade
- Energy Fiji Limited
- External Auditors
- Commercial Banks
- Rating agencies
- International Finance Corporation
- Commonwealth Secretariat
- External Fund Managers
- Investee Companies
- External Financial & Hotel Valuers
- Fiji Competition and Consumer Commission
- Other relevant external stakeholders

## **Working conditions**

The incumbent may be required, to from time to time, to work late hours or during weekends, including travelling to other FPNF branches & agencies or, to work in other functional areas for job rotation for developmental purposes.