



## **LIM Portfolio Analyst**

**Longfellow Investment Management Co., LLC (LIM)** is an independent, 100% employee-owned investment firm managing over \$16 billion in fixed income, equity, and alternative investment strategies. We manage separate accounts for our nationally based, institutional clients. LIM is a certified Women's Business Enterprise and an affirmative action – equal opportunity employer. LIM provides a small firm environment with comprehensive investment industry exposure. In addition to salary, we offer an attractive benefits package.

### **Job Description**

LIM is seeking a fixed income portfolio analyst whose primary focus will be surveilling institutional client portfolios across US dollar denominated and primarily investment grade mandates. The position will report to a portfolio manager of the designated strategy.

### **Primary Responsibilities:**

- Interact closely with portfolio managers, research analysts and traders to ensure timely and accurate maintenance of portfolio investments, positions, and targets across a variety of portfolios: including curve, duration, quality, and sector objectives
- Prepare customized reports for clients, using portfolio management software and analytical tools; review and contribute to commentary of attribution, positioning and outlook.
- Contribute to investment strategy discussions and development; and effectively implement ideas across portfolio mandates with different constraints
- Gather and disseminate portfolio objectives to the research and trading teams on a consistent basis to ensure continuity among strategies
- Update and improve various risk management tools that assist in monitoring accounts across similar mandates
- Work with the client reporting team to ensure portfolios statistics are accurately presented
- Assist in rebalance of portfolios in response to cash flows, benchmark changes, market price movements, and changes to client guidelines
- Support monitoring client investment policy statements and verify that transactions are consistent with guidelines
- Other fixed income related projects

### **Qualifications:**

- A minimum of 3-5 years of fixed income portfolio research, trading and/or analytics experience
- Bachelor's degree is required with progress or completion towards a post graduate degree and/or CFA
- Advanced quantitative, analytical, and technological (Bloomberg, MS Excel, etc.) skills
- Understanding of data management, data governance and experience with SQL, legacy VBA, ETL processes preferred
- Strong interpersonal and organizational skills
- Ability to be accurate under tight time constraints in a high-pressure environment

**Qualified applicants should email a cover letter and their resume to:**

[Jobs@LongfellowIM.com](mailto:Jobs@LongfellowIM.com)

Subject: LIM Portfolio Analyst

No calls please