MaxCap Group

POSITION DESCRIPTION

Position Title:	Analyst - Investment
Last Updated:	March 2021
Reports to:	Associate Director - Investment
Direct Reports:	Nil
Primary Objectives(s):	The Investment Analyst is responsible for delivering the end-to-end transaction process by completing ongoing, real-time business / financial / credit analysis and preparation of detailed papers to facilitate informed decisions. The role will coordinate credit process by managing internal stakeholders.
Key Relationships / interactions:	• Investment Team • Chief Risk Officer • Current and prospective clients • Client representatives • External service providers

ROLES AND RESPONSIBILITIES

Key Result Areas	***Major Activities***
[Credit Process:	• Work collaboratively to support Investment Directors and the wider investment team on new proposals • Adhere to internal systems, process and policy at all times • In conjunction with internal stakeholders and external legal advisers prepare and document terms and conditions of offer letters • Draft information memorandums and internal credit papers for approval and present overview to investment committee or institutional or private investors as required • Ensure effective management of the transaction process, including internal and external stakeholders to meet agreed timeframes • Assimilate complex information with a view to enhancing investment opportunities by effectively communicating the strengths of each deal while recognising risk and demonstrating how this risk has been mitigated • Liaise with internal and external stakeholders throughout the transaction process, assisting with deal execution and due diligence to ensure that all conditions precedents (CPs) are satisfied

	• Professionally and efficiently address concerns or queries raised by clients, third parties and key stakeholders; promptly escalate issues to senior team members as required • Manage and mitigate risk through effective collaboration with internal stakeholders and external advisors • Modelling transactions and assisting in structuring and pricing loan products and responding quickly to new business inquiries
Relationship Management:	• Maintain relationships with a portfolio of clients (corporate, private and institutional) focusing on building and sustaining deep customer relationships • Liaise with clients, third parties and key stakeholders throughout the credit process of a deal • Utilise industry and local market insights to effectively communicate product and services to clients • Identify and implement improvements relating to internal processes
Strategy & Planning:	• Compiling and sharing of industry knowledge and market intelligence to identify opportunities and trends • [Assist with ongoing workflow process development and improvement using in-house proprietary software platforms]

SELECTION CRITERIA

Culture Alignment:	We value: • Success • Ownership • Agility • Relationships • Integrity S.O.A.R with Integrity
Interpersonal / Communication Skills:	It is essential that the successful candidate of this role possess the ability to: • Communicate effectively (written and verbal) • Build strong relationships based on trust and respect • Persuade and influence the thoughts and actions of others to achieve optimal outcomes • Articulate and persuasively present critical argument • Build rapport and professional credibility

MaxCap Group

Education, Experience, Skills & Knowledge:	• Co-ordination and writing of information memoranda and transaction papers • Financial services or commercial property experience (banks, financial institutions, private investment firms / groups or related professional) • A relevant degree in law, commerce or business (finance related discipline) • Strong commercial property finance acumen • Experience developing and managing customer relationships
Personal Competencies (e.g. traits, abilities):	• Strong stakeholder management skills • Ability to work effectively under pressure and meet tight deadlines • Strong analytical and problem-solving ability • Good lateral thinker able to develop solutions • Ability to plan effectively and take accountability for delivering results • Strong financial analysis and interpretation skills • Ability to negotiate and influence • Commitment to high standards of client service with a balanced focus on the commercial priorities • Acts ethically and with unquestionable integrity • Desire and willingness to strive to achieve optimal results • A flexible and agile approach • A continual improvement mindset with a desire to continue to learn and grow • Attention to detail