

About Xponance

Xponance is a registered multi-strategy investment firm with approximately \$13 billion in assets across multiple strategies. Our entrepreneurial culture is driven by the company's dual objectives of serving clients as a trusted and value-added solutions partner, we continually endeavor to provide investment excellence generated by diverse and entrepreneurial professionals. We strive to be an industry leader and "force-multiplier" for diversity and client engagement. Xponance offers actively managed global, international, and emerging market equity strategies via a multi-manager structure; internally managed active US fixed income, systematic equity, active and passive equity strategies; and diverse and emerging and woman owned alternative GP Seeding and Staking strategies. Our technology subsidiary, Aapryl, LLC, offers a web-based analytical platform that assists asset owners in portfolio, asset manager and risk due diligence as they seek external partners to fulfill their fiduciary duties.

Opportunity – Research Analyst

Xponance is seeking qualified candidates for the role of Manager Research Analyst. Working within the Active Global Equities division, the key objective of the role is to source and evaluate equity managers for inclusion in institutional multi-manager equity portfolios. The analyst will be expected to build a pipeline of potential managers, focusing on boutique managers operating in capacity-constrained markets, such as non-US and Emerging markets. Experience is preferred, but not required. Successful candidates will be able to work closely with team members but are internally motivated and intellectually curious. We encourage innovative thinking and provide team members with the ability to pursue new ideas and approaches.

Principle Responsibilities

The responsibilities of the Research Analyst include:

- Develop and recommend investments to the CIO for overlay accounts in U.S. and non-US equity strategies.
- Contribute to original white papers, market outlooks, and studies for broad publication across the global investment community.
- Perform due diligence on approved and prospective equity managers for multi-manager portfolios. In addition to philosophy, people, and process, due diligence responsibilities also include detailed business and financial viability analysis as well as operational and compliance due diligence.
- Analyze performance, portfolios, and factor exposures and trends on approved and prospective manager portfolios.
- Provide manager investment recommendations to the CIO and Senior PM.
- Provide quarterly and ad hoc performance, business, and operational oversight reporting on approved managers to the CIO, Investment Committee, and clients.
- Review industry publications and research papers to stay current and continuously refine manager research best practices.
- Work with industry contacts to continuously source new managers from startups, lift-outs, and other new opportunities.
- Counsel and advise boutique managers on marketing and business best practices within the industry.
- Evaluate third-party vendors for suitability in providing outsource investment, operational, and/or compliance services to managers.
- Negotiate fees and terms with prospective managers.
- Support the CIO and senior PM in building multi-manager portfolios.
- Travel to industry conferences and due diligence meetings required (<25% the time).

EXPERIENCE & ATTRIBUTES:

Key qualifications include the following:

- Three or more years of professional investment experience preferred.
- Experience with financial markets, investment research, equity investment strategies.
- Intellectual curiosity.
- Strong Microsoft Office (Excel in particular) proficiency.
- The ability to work collaboratively across all levels of the platform as well as the organization.
- Strong attention to detail, great organizational skills, and the ability to multitask efficiently and effectively.
- Excellent communication skills (written and verbal).
- Strong interpersonal skills that engender credibility and trust.
- Comfort in a creative, entrepreneurial, and diverse culture.
- Bachelor's Degree (required).
- CFA charter or willingness to work towards CFA charter preferred.

Candidates interested in the Research Analyst opening can forward a resume to: careers@xponance.com.