

APPENDIX ONE:
Job Description



POSITION TITLE:	Research Analyst (Australasian Equities)
LOCATION:	Private Wealth Research, Head Office
REPORTS TO:	Senior Research Analyst

POSITION SUMMARY

The Research Analyst is responsible for providing research on markets, portfolio thematic and Australasian equities for our advisors and clients. This is an important role and given our firm's core business is the provision of portfolio management and investment advisory services for private clients, a broad understanding and knowledge of markets is required.

The Research Analyst is part of the Private Wealth Research (PWR) team that is responsible for co-ordinating and delivering all aspects of the firm's investment research for its private clients. Value is added to clients at many levels including company insights, stock and sector selection ideas, model portfolio performance, evaluation of IPOs and corporate opportunities, morning meeting contributions as well as high service standards and support to other members of the team.

Research is a high profile area of the Craigs Investment Partners business. It requires a high standard of written and oral communication, market knowledge and financial analysis ability. The PWR team covers listed equity securities in NZ, Australia, Asia, Europe and North America, fixed income, currencies, portfolio strategy, economics and corporate actions and is disseminated to the firm's 160 advisors, as well as clients.

KEY RESPONSIBILITIES

- Focus on Australasian equities, while maintaining a knowledge and understanding of other asset classes.
- Maintain an understanding of the key earnings and performance drivers for stocks and sectors covered by PWR.
- Maintain an understanding of the institutional analyst views for stocks and sectors covered by PWR.
- Regularly speak with company management and attend investor events.
- Produce regular reports for clients covering portfolio ideas, sector views, and individual stock selection.
- Contribute to the firm's model portfolios for New Zealand and Australian equities.
- Contribute to recommendation decisions for New Zealand and Australian equities.
- Maintain a dynamic database of one-page company profiles.
- Conduct analysis and report back to the team and network on potential IPO opportunities.
- Maintain and build upon our linkages with our network of institutional research affiliates and other sources.
- Recommend and communicate appropriate action to be taken with regard to corporate actions for stocks.
- Contribute to the daily research conference call.

GENERAL DUTIES AND RESPONSIBILITIES

- Operate within the parameters of the NZX rules and regulations and CIP procedures and policies.
- Maintain a high level of competence with Craigs Investment Partners' systems.
- Maintain the core competencies as set down by the firm from time to time.
- Complete all Company educational requirements as required for the role as set by the Company.
- Act professionally, ethically and work co-operatively and constructively within the framework of the company structure.
- Any other tasks as requested by your manager.

PERSON SPECIFICATION

Qualifications	<ul style="list-style-type: none"> • Tertiary qualification in a finance or business-related discipline
Knowledge/Experience	<ul style="list-style-type: none"> • At least three years financial services experience • Experience in markets, portfolio management, company and investment analysis. • A broad general knowledge of markets across all asset classes • A strong appreciation of the portfolio management issues affecting private investors. • A track record of success in previous roles
Key Skills and Attributes	<ul style="list-style-type: none"> • Excellent time management and organisational skills • Positive and professional client service manner, accommodating and empathetic attitude • Strong written and verbal communication skills • High level of accuracy and attention to detail • Intermediate Microsoft Office user (Word, Excel and PowerPoint) • Willingness to work as part of a team • Self-starter with the ability to show initiative