

# Investment Analyst CV

Terence Smith

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## PERSONAL PROFILE

A enthusiastic, energetic and hard working investment analyst who has a successful and consistent track record of achieving high returns for clients. Possessing extensive knowledge of global financial markets, including a wide variety of industries and sectors. Employing a evidence-based approach to all projects and experienced in assisting senior analysts and fund managers in writing accurate company-specific reports..

Currently looking for a suitable positions with a exciting and expanding company.

## AREAS OF EXPERTISE

- Private equity
- Portfolio monitoring
- Time management
- Portfolio maintenance
- Direct client relations
- Product research
- Pension funds
- Unit trusts
- Troubleshooting

## CAREER HISTORY

### **INVESTMENT ANALYST**

Investment Company

May 2008 - Present

Providing expert and professional advice, guidance and recommendations on a wide variety of industries.

Constantly focusing in obtaining a excellent return on investment for clients.

- Analysing industry trends.
- Undertaking detailed analysis of various portfolios.
- Responsible for project progress documentation & schedule updates.
- Travelling to client and partner companies and holding meeting with senior managers.
- identify any inconsistencies and bringing them to the attention of senior managers
- Identifying and commenting on key investment issues at managerial meetings.
- Involved in the development of investment process and strategy.
- Maintaining internal databases and record systems.

### **TRAINEE INVESTMENT ANALYST**

Investment Bank

Apr 2007 – May 2008

As a new member of the team I was responsible for administrative and customer support to the investment department of an expanding company. Whilst doing this I was also learning on the job and my duties included attending meetings with clients, as well as researching companies and compiling reports on potential investment opportunities.

- Reading up on financial services legislation, regulations and industry issues.
- Contacting private clients by telephone, email and fax.
- Thoroughly investigating companies.
- Building and maintaining relationships with investment managers.
- Investigating and analyzing economic and market trends.
- Involved in equity analysis & company analysis.
- Reading financial statements and then coming to conclusions.
- Responsible for project progress documentation & schedule updates.

## PREVIOUS CAREER HISTORY

### **MORTGAGE ADVISOR**

Leading Bank

May 2006 – Apr 2007

### **TRAINEE MORTGAGE ADVISOR**

Mortgage Loan Company

Jan 2005 – May 2006

### **BANK CASHIER**

High Street Bank

Jul 2004 – Dec 2004

## KEY SKILLS AND COMPETENCIES

### **Professional**

- Having a thorough understanding of investment disciplines.
- Data maintenance & accuracy.
- Responsible for project progress documentation & schedule updates.
- Attending pre- site / on-site meetings with clients, Senior Construction Managers and government officials.
- Knowledge of Bloomberg, Datastream and other financial information sources.
- Can communicate effectively and build relationships with high net worth individuals.
- Gaining a understanding of market segment and then writing reports about them.
- Ensuring that appropriate legislative, regulatory, professional and business standards are adhered to.
- Ability to constantly be on the look out for new investment opportunities.
- Responsible for project progress documentation & schedule updates.

### **Personal**

- Able to work well under pressure, prioritise workload and work to deadlines.
- Can work on own initiative.
- Excellent written and verbal skills.
- Highly motivated with a positive attitude.
- Reliable and punctual.
- Passionate about the world of financial investments.
- Having a high level of intellectual curiosity.
- Willing and able to travel around Europe and the World.

## ACADEMIC QUALIFICATIONS

### **London University**

BA (Hons) Economics                      2002 - 2005

### **Nottingham College**

A levels:    Math (A)    English (B)    Physics (D)    Geography (A)                      2001 - 2002

### **Professional**

CFA

Investment Management Certificate

## REFERENCES

Available on request.

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