

**Metis Global Partners**  
**Research/Portfolio Analyst**  
**Position Profile**

**METIS GLOBAL PARTNERS**

Metis Global Partners, LLC is a diverse/woman-owned and led institutional global equity manager founded in 2013 and based in San Diego, California. The firm's active value-oriented Global, International and Emerging Market systematic strategies have enjoyed recently renewed interest in Value investing. In addition, response to Metis' Beta capabilities launch in 2021 has been very positive, with inflows to date exceeding \$1 billion over the last year and 25+ new institutional Beta clients. In 2022, Metis plans to launch its Guided Beta™ strategies to provide clients with customized Beta solutions including Climate Aligned and ESG Beta strategies.

Metis is experiencing dynamic growth and maintains an entrepreneurial culture with opportunity for team members to make significant contributions and grow with the firm. Working at Metis, you'll be empowered to contribute meaningfully to a rapidly growing company. You'll be involved in the long-term evolution of the firm, helping to build the Metis of the future. And you'll be able to serve an agent of change in the industry, supporting the growth of Diversity and Inclusion through a diverse/woman-owned organization.

Cognitive diversity and intellectual curiosity are guiding lights at Metis, allowing the firm to embrace and harness unique perspectives into the management and day-to-day operations of the firm. This, combined with a flat organizational structure, allows contribution of opinion and thought to flow freely.

## POSITION SUMMARY

Metis is hiring a Research/Portfolio Analyst who is highly detail-oriented, flexible and enjoys working in a team-oriented environment. The successful candidate will demonstrate a strong desire to take ownership of tasks and contribute in a variety of functional areas while seeking to grow long-term within a dynamic organization. Responsibilities will be diverse and require periodically working with others to formulate implementation strategies by gathering, organizing and integrating data into the investment process.

### Responsibilities

- Utilize quantitative tools to accurately gather and analyze portfolio exposures and performance attribution summaries for dissemination to the Investment Committee.
- Continuously monitor portfolios to ensure consistency with investment objectives, policies, internal controls and regulatory requirements.
- Maintain daily holdings, benchmark and cash flow data processing.
- Financial statement and accounting analysis of valuation data.
- Assist with trade creation due to cash flows or change in investment policy.
- Assist marketing department in a variety of scenarios wherein investment process and portfolio details are needed: presentation decks, RFPs/RFIs, external databases, etc.
- Assist with research and preparation of written positioning and performance summaries including investment rationale for external distribution.
- Participate in client/prospect/consultant sales and/or review meetings as necessary.
- Provide answers to investment process and portfolio related questions from clients and prospects.
- Assist with client/partner reporting deadlines and ad-hoc requests.
- Assist with new product development.
- Respond to ad hoc projects as necessary, such as competitive intelligence, client requests and more.

## QUALIFICATIONS

Candidates should have 2-5 years of investment related experience in an analytical role at a buy-side firm or as a client consultant at an investment analytics firm such as FactSet, CapitalIQ, Axioma, Barra, etc. BS in Economics, Finance, Mathematics, Engineering, or similar discipline with CFA progress preferred.

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### **Additional Qualifications**

- Exposure to trade generation, trading, risk analysis, performance attribution, and investment operations/accounting processes.
- Broad knowledge of global equities.
- Strong financial acumen and outstanding data handling skills.
- A positive, collegial attitude and high level of professionalism are essential.
- Ability to remain process-oriented within a time-sensitive market framework.
- Strong interpersonal skills with the ability to concisely articulate oneself.
- Excellent organizational skills with strong attention to detail.
- Strong work ethic with commitment to quality and accuracy.
- Flexibility to work on multiple high priority requests simultaneously.
- Desire to succeed in a team-oriented environment.
- Capacity to learn quickly and work independently.
- Proficiency with Microsoft Excel. SQL a plus.
- Ability to learn new programs quickly.

### **COMPENSATION**

Our client is prepared to offer a very attractive compensation package, including a competitive base salary as well as health, 401(k), and vacation benefits.

### **Equal Employment Opportunity Policy**

Our client provides equal employment opportunities (EEO) to all employees and applicants for employment and prohibits discrimination and harassment based on race, color, religion, gender, gender identity, national origin, sexual orientation, age, disability, or veteran status.

## CONTACT

The Lawrence Advisory has been engaged by the client to help in this confidential search. The search is being led by:

Tracy L. Lawrence  
Founder & CEO

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Steve Foster  
Principal

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Please submit letters of interest and resumes to:

Tiffany Scott  
Director of Candidate Development  
[tiffany@thelawrenceadvisory.com](mailto:tiffany@thelawrenceadvisory.com)

## ABOUT THE LAWRENCE ADVISORY

The Lawrence Advisory is a human-capital consulting firm that offers Executive Search, Organizational Development and Leadership Coaching. We specialize in servicing innovative organizations with distinct cultures. For more information, refer to our website at <http://www.thelawrenceadvisory.com>.