

## Graduate Role - Portfolio Analytics Associate

- Fast-growing, market leading business
- Varied role with exciting career progression opportunities
- Opportunity to build knowledge with full training and ongoing support
- Supportive, dynamic team with great culture and strong core values

## About the Role

### Summary

<b>Title</b>	Portfolio Analytics Associate
<b>Team</b>	Portfolio Analytics & Sales
<b>Manager</b>	Executive Director – Head of Institutional Business
<b>Position Type</b>	Permanent, full time
<b>Location</b>	Sydney

### About the Role

We are seeking an enthusiastic, self-motivated university graduate or candidate with 1-3 years experience to join the Betashares distribution team as a Portfolio Analytics Associate.

The successful candidate will work closely with our experienced and market leading distribution team, providing day to day support across a broad range of activities (including portfolio and fund analytics, and assisting with investment idea creation and completing client due diligence requests), as well as providing exceptional client service to our large retail, adviser and institutional investor base.

Experience in customer facing roles and confident phone manner will be an advantage.

Full training and ongoing support will be provided to ensure you hit the ground running and continue to grow your skillset and build a rewarding career. Our collaborative team will train and support you to ensure you become the best you can be.

The role will provide you with the opportunity to build knowledge and a rewarding career in one of the most innovative and progressive financial services companies in Australia.

Successful candidates have the opportunity to grow into a wide range of roles including investment analyst and investment strategist as their experience and knowledge develops within the firm and aligned with strong expected growth in the ETF industry.



## About Us

Betashares was founded in 2009 and launched with the vision to create intelligent and accessible investment solutions for Australian investors. Over the past decade our dedication to helping Australian investors achieve their financial goals has seen Betashares grow from 'challenger' to market leader, driving disruption and innovation in the exchange traded funds (ETFs) industry.

Betashares offers the broadest range of exchange traded funds on the ASX and is trusted by over a million investors. As of October 2023, Betashares manages over \$30 billion in assets

We currently have offices in Sydney, Melbourne, Brisbane, Perth and New Zealand and a growing team of over 135 people.

## Our Values

As our business continues to grow, we're committed to creating a workplace that gives us all the best opportunity to succeed, and that is enjoyable to be a part of.

We prize ambition and drive, but equally we value honesty and humility.

We support each other, and we respect our clients and our competitors. Innovation is in our DNA, and we are always looking for better ways to do things and are willing to take measured risks and learn from our mistakes along the way.

## What we offer

Betashares believes our most important asset is our people and we are proud of the culture we have built – but we are always striving to be better. We want every Betashares employee to be doing their best work and developing their careers.

In addition to a competitive salary, we also offer:

- Staff career development and training allowance.
- Access to a health and wellbeing platform with physical, mental, social and financial support programs available.
- Volunteering days off, so you can contribute to a cause that matters to you.
- Newly renovated CBD offices with fully stocked kitchen, team breakfasts and catered lunches on a regular basis.
- Fun and inclusive social events.

This role is a fantastic opportunity for someone looking to further their career in a growing and dynamic business.

## Role Responsibilities

- Supporting our Investment Specialists and Distribution Team with fund attribution and competitive peer fund analysis
- Conducting portfolio analytics, to assist clients with portfolio construction including fund selection and asset allocation
- Completing due diligence questionnaires and assisting with fund research reviews
- Assisting with the creation of investment ideas and fund commentary
- Providing high quality customer service - representing the company in a positive and professional manner
- Receiving, handling and responding to inbound calls and emails from investors and adviser clients

## Key skills and experience

- B Com, B Bus, B Ec. or equivalent, other degree qualifications considered.
- Experience in a similar role an advantage
- Genuine interest in financial markets and investment products is essential
- High attention to detail and accuracy
- Strong customer service skills
- Confident phone manner with exceptional listening skills
- Computer literate with the Microsoft suite
- Strong verbal and written communication skills
- Ability to work individually as well as within a team

Ready to make an impact? If you have full working rights in Australia, please submit your CV to [careers@Betashares.com.au](mailto:careers@Betashares.com.au). Your interest will be treated in strict confidence.