

Investment Strategist – Investment Strategy and Research team

- Fast-growing, market leading business
- A wide range of opportunities for professional development and career advancement
- A culture that embraces innovation and strives for success, while remaining humble and providing a supportive team environment

About the Role

Summary

Title	Investment Strategist
Team	Investment Strategy and Research team
Manager	Senior Investment Strategist
Position Type	Permanent, full time
Location	Sydney

About the Role

We're looking for an experienced and passionate investment professional to join our Investment Strategy and Research team to enhance our market research capabilities and thought leadership.

The successful candidate will generate market-leading investment insights and research, including content on:

- The macroeconomic environment and investment landscape
- Financial markets, including country, sector, factor and theme specific commentary, and portfolio construction across asset classes
- Our fund suite, including developing product specific messaging

The new team member will deliver regular content across multiple formats, including research notes, presentation materials, video content and whitepapers.

The role requires independent thought and idea generation, and the ability to work collaboratively and leverage insights from the Investment Strategy and Research and Portfolio Management teams.

After building a strong product knowledge of our funds and competitor products, responsibilities would expand to include:

- Presenting to our client base and representing Betashares at industry events and in the media
- Working alongside our Distribution team to assist high value clients with portfolio construction and fund implementation ideas, and
- Contributing to new product development.

The role provides the opportunity for a high-quality candidate to build a name and reputation for themselves with one of the leading fund managers in Australia.



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

Initial responsibilities will include:

- Contributing to regular research issued on global equity markets, as well as investment styles and emerging investment themes.
- ISR ownership for a subset of our funds – for which you will drive client and Distribution team engagement through regular commentary and performance analytics.
- Authoring evergreen investment education and whitepapers.
- Developing messaging for new funds, including working closely with the marketing team to create sales aids and client materials.
- Developing presentation materials for campaign and sales events, including webinars and roadshows.

In time, responsibilities will expand to also include:

- Presenting in various forums including Betashares events, client events and in the media.
- Supporting Distribution team in external client meetings across the advised client segments through expertise and insights into markets, portfolio construction and our product set.
- Conducting internal training sessions and market updates for the wider Distribution team.
- Participating in the Product Development Committee and taking responsibility for specific new product and business initiatives.

Key skills and experience

- Relevant tertiary qualifications
- 5+ years' experience in financial markets, with specific experience as a buy side/sell side research analyst, assistant PM, asset consultant, investment specialist or in a role responsible for construction of multi-asset portfolios.
- Proven analytical ability and technical financial markets knowledge, ideally across all asset classes
- Experience with relevant market data systems
- Knowledge of the Australian asset management industry, including ETFs and other investment products.
- Ability to produce high quality written investment research, including distilling complex topics to present interesting and compelling market insights/investment ideas
- Excellent presentation skills
- Self motivation, strong influencing and relationship management skills
- Ability to work with individuals from all parts of the Betashares business, across a wide range of topics and project areas.

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