Investment Performance Analyst

Becker Capital Management, Inc. is seeking an Investment Performance Analyst to join our team. Our talented and cohesive team is committed to providing a best-in-class experience for our clients. We're looking for a highly motivated individual with attention to detail and the ability to meet deadlines.

The Investment Performance Analyst will be responsible for collecting, analyzing, and reporting on the performance and risk metrics of client investment portfolios. The analyst ensures data integrity, supports regulatory compliance, and delivers insights to portfolio managers, relationship managers, and clients to inform investment decisions and provide data to end users.

Responsibilities will include:

- Collect, input, and validate financial and performance data for client portfolios, ensuring accuracy and completeness
- Calculate and analyze investment returns, risk metrics, and performance attribution at portfolio, asset class, and security levels
- Produce recurring and ad-hoc performance reports for internal teams as well as for clients
- Compare portfolio performance against benchmarks, industry standards, and peer groups, identifying trends, anomalies, or outliers
- Support the development and implementation of performance measurement methodologies and reporting systems
- Participation and contribution of performance information to regular investment team meetings
- Respond to performance-related queries from clients, portfolio managers, and in response to other requests
- Participate in special projects, process automation, and continuous improvement initiatives within the performance analytics team

Qualifications:

- Bachelor's degree in finance, accounting, economics, mathematics, or a related field
- Minimum of two years' experience in a similar role
- Finance-related certificate or designation is preferred (e.g. CIPM, CIMA, CAIA)
- Strong analytical, quantitative, and critical reasoning skills
- Proficiency in data management, spreadsheet applications (Excel), and performance measurement software/tools (Tamarac, Addepar, etc.)
- Familiarity with or willingness to learn quantitative research analytics tools (Axioma, Barra, Bloomberg, etc.)
- Strong organizational skills required to manage the demands of multiple separately managed accounts
- Rigorous attention to details and great time-management skills
- Team-oriented with a desire to collaborate

- Ability to effectively communicate in writing and verbally to both internal and external audiences
- Commitment to an outstanding client experience, irrespective of specified role or title

Job Location:
Portland, Oregon

Benefits and Pay:
- Base salary range for this role is $75,000-$85,000 depending on experience
- Annual bonus potential
- Health, and vision insurance for dependents and employees
- Life insurance
- Long Term Disability insurance
- Employee Assistance Program
- Profit-Sharing Plan
- PTO/Vacation plan
- Paid Sick Leave

Company Overview:
Becker Capital Management, Inc. is an employee-owned, boutique investment advisor. Since 1976, the firm has employed a consistent investment philosophy to provide comprehensive wealth and investment management services to high net worth individuals, families, nonprofit organizations and institutions.

Becker Capital is passionate about creating an inclusive environment that values each employee's unique differences. Applications are encouraged from candidates reflecting diverse educational, cultural, and experiential backgrounds. Becker Capital is an equal opportunity employer. It is our policy to recruit, hire, promote, and pay wages without unlawful discrimination on the basis of race, religion, color, sex, age, marital status, sexual orientation, national origin, disability, veteran status, genetic information, or any other classification protected by law.

Please send a cover letter and resume to jobs@beckercap.com. All inquiries will be strictly confidential.