INVESTMENT ANALYST/SENIOR INVESTMENT ANALYST, REAL RETURN GROUP

REPORTS TO:
Investment – Real Return Group

CLASSIFIED/EXEMPT:
Director, Real Return Group

Incumbent:
Classified

Vacant

SIC start date: Open

10/15/2014

This position assists in protecting and growing New Mexico State Investment Council's (SIC) permanent endowment funds for current and future generations, through prudent and professional investment management.

The New Mexico State Investment Council is a sovereign wealth fund which manages the permanent funds of the State of New Mexico, valued at approximately $20 billion as of September, 2014. The New Mexico State Investment Council’s target allocation to Real Estate is 10% and the target allocation to Real Return is 12%. The Real Return portfolio consists of a broad range of asset types including floating rate bank loans, TIPS, energy, timberland, agriculture and infrastructure.

This position provides comprehensive analytical support to the Director of Real Return and Real Estate. This role involves working with quantitative and qualitative methods to assist in the due diligence, review and selection of new managers, and investments for these portfolios, and for the ongoing active management and review of the investments and managers in the Real Return and Real Estate portfolios.

DUTIES & RESPONSIBILITIES:

At the direction of, and under the supervision of, the Director, Real Estate and Real Return Group (DRRG) this position:

- Participates in monitoring and reporting on portfolio investments within the RRG, including but not limited to, reviewing financial statements, return information, quarterly and annual reports, participation in quarterly and annual manager calls and meetings and other ad-hoc monitoring assignments. Prepares regular and ad-hoc reports;
- Contributes to the development and maintenance of manager and consultant relationships.
- Researches, reviews and monitors investment pipelines for Real Estate and Real Return;
- Assists in undertaking quantitative and qualitative research and due diligence tasks on prospective investment
managers, strategies and organizations in the real estate and real return areas. Arranges meetings, correspondence and other due diligence activities as required;

- Monitors the capital markets and investment trends in the Real Return area and provides analysis, market intelligence and opinion to the DRRG and the Deputy State Investment Officer (DSIO);
- Monitors news and industry reports;
- Participates in the development and maintenance of investment policy and procedures and contributes to portfolio construction, including ongoing monitoring of the portfolio for compliance with various policies;
- Assists in the preparation of investment papers and presentations and is available for meetings or discussion, as required by the DRRG;
- Assists in the legal documentation of investments;
- Maintains the RRG systems;
- Attends industry conferences, workshops and related professional gatherings as required; and
- Other duties assigned by the DRRG.

SKILLS/QUALIFICATIONS/EDUCATIONAL REQUIREMENTS:

Bachelor’s degree in business, finance, accounting, engineering, science or a related discipline.

Minimum 5 years of professional work experience

Proficiency in Microsoft Word, Excel and Powerpoint including intermediate modeling skills.

Experience in one (or more) asset class within real estate or real return (energy, infrastructure, timberland, agriculture, loans)

Desire to become proficient in the real estate and real return asset classes

Ability to multi-task and manage multiple work-streams.

Ability to work as a team player.

Excellent interpersonal skills.

The State Investment Office is located in Santa Fe, New Mexico. Santa Fe is situated at 7,000 feet elevation, among northern New Mexico’s Sangre de Cristo, Jemez and Sandia mountains. The area has a moderate, dry, high desert climate featuring more than 300 days of sunshine each year. The city is well-known for its long history (more than 400 years as a capital city), large arts community and diversified outdoor activities. Santa Fe is approximately an hour’s drive north of the populous city of Albuquerque, New Mexico.

This position is full time and as an employee of the State of New Mexico. The position (Securities/Commodities/Financial-Advanced #68208) is classified respecting the State Personnel Act. (Section 10-9-1 et seq. NMSA 1978). Compensation is annual salary plus State of New Mexico employee benefits.

Qualified applicants may contact Geraldine Barlow, Director Real Return, for further information at 505.476.9545 or Geraldine.barlow@state.nm.us

All applicants MUST apply through the New Mexico State Personnel Office at http://www.spo.state.nm.us.