

Investment Associate

About Us

Handelsbanken Wealth & Asset Management is a wholly-owned subsidiary of the Handelsbanken Group and is responsible for all wealth and investment management activities of the Group in the UK. Founded in Sweden, Handelsbanken is one of the world's strongest banks and offers local relationship banking, advice and investment management to personal and corporate customers through its fast-growing network across the UK. For over 30 years we have been relied on by our customers, including business leaders and sophisticated financial professionals, to advise them and to manage their wealth. We focus on one objective – customer satisfaction – since a satisfied customer will be happy to both return and to recommend us.

This is an opportunity to join a successful and fast-growing national organisation with the added benefit of being part of a significant multinational group.

Handelsbanken Group are deeply committed to embedding good equality and diversity practice into all of our activities so that Handelsbanken Wealth & Asset Management is an inclusive, welcoming and inspiring place to work, regardless of age, disability, pregnancy and/or parental status, ethnicity, religion, sex, gender reassignment or sexual orientation.

We encourage and welcome applications from across the global community and all appointments are made solely on merit.

Salary & Benefits

- Competitive market rates
- Group personal pension scheme, private medical insurance, life insurance, income protection insurance, preferential staff rates, 25 days holiday, season ticket loan, long term profit sharing scheme

Our Role

An opportunity to join an established investment team with a keen and growing focus on sustainable investing. The successful candidate will work alongside the two Sustainable IMs to help meet the sustainability objectives of Handelsbanken's investment strategies. The role will report to Head of Sustainable strategies.

We are looking for an individual with either a work or academic background in sustainability/ESG analysis ideally within an investment management context, and a passion for applying their unique skill set to creating change within the financial services industry.

With essential interactions with a multitude of third parties (Fund managers, industry bodies, clients) as well as internally, the role will suit an individual who has attention to detail, a good self-motivated work ethic and strong communication skills.

Main Responsibilities

ESG/Impact reporting:

- Monitor the portfolios from a sustainability perspective.
- Lead the impact measurement and related data collection.
- Produce sustainability insight and research across a number of themes; Support investment analysts in fund research (particularly in the Fixed Income space).
- Produce written and verbal marketing content; Reporting on sustainability characteristics of portfolios, sustainability news and investment opportunities.

Investment Research – Fixed Income focus:

- Support the Fixed Income team with research projects and lead on Fixed Income research within the Sustainable universe

- Actively contribute to broader team debate and discussion

Client servicing:

- Support ongoing client relationship management; Dealing with queries in relation to sustainability characteristics of portfolios.
- Eventually support business development with a focus on pitching our Sustainable strategies
- Develop a deep understanding of our approach and industry trends
- General investment knowledge a benefit

Person Specification

- Strong communication and relationship management skills.
- Good Microsoft Excel skills, numerate with a strong attention to detail.
- Be driven and have a self-starter mentality.
- Passionate about the role of sustainability in business and investments.
- Is business-oriented and focuses on the customer.
- Takes a long-term approach.
- Has the courage to make decisions.
- Is innovative and proactive.
- Takes responsibility for his/her own development.
- Has high ethical and moral standards.
- Collaborates with others to achieve joint goals.

Academic:

- A relevant undergraduate/postgraduate degree.
- Willing to study towards CFA ESG certificate

Experience:

- Financial services experience required
- A relevant undergraduate/postgraduate degree or work experience in relation to sustainable business, environmental sustainability and/or global development.
- Some investment research experience desirable

Contact

Please send your CV and covering letter to careers.hwam@handelsbanken.co.uk