

Capstone Asset Management is a Portfolio Manager, Investment Fund Manager and Exempt Market Dealer serving clients in British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, Quebec, New Brunswick and Nova Scotia.

Holding to Biblically informed values, we provide full discretionary investment management and individual investment mandates to high net worth individuals and families, institutions, pensions, foundations, and family offices. We are a boutique firm with approximately \$490 million in assets under management.

Title: Portfolio Manager/Senior Analyst

Reporting to: Chief Investment Officer

Department: Investment Management Team

Location: Langley, BC

Summary of Position:

Capstone seeks a Portfolio Manager or Senior Analyst who, as part of the Investment Management Team, will provide fundamental, quantitative, and technical research and analysis to assist in managing the firm's seven proprietary pools. Your background in the investment industry, coupled with experience with non-traditional and traditional investing and research, will provide the platform to actively engage in the management of our strategies. Capstone is looking for a self-starter, organized team player who aligns with our philosophical values.

Duties & Responsibilities:

Portfolio Management

- As a member of the Investment Management Team, provide analysis of a wide range of potential and current investments including qualitative and quantitative reports and screens to support the work of developing stable and profitable portfolios within the company's proprietary funds.
- As a member of the Investment Management Team, provide strategic and tactical asset allocation recommendations.
- Identify and assess new traditional and non-traditional investment opportunities for existing and future pools.
- Provide insight and analysis as a voting member of the Investment Committee.
- Execute trades as necessary within the pools.
- Report on overall risk exposure of the pools by measuring and understanding their risk metrics.
- Develop proprietary research and reports to help support investment thesis.
- Willingness to support other parts of the organization with your expertise as necessary.

Technical Oversight

- Development and maintenance of tools that generate robust and accurate reporting on investments, economic data, and our pools.
- Support data, research, and pool information needs of the Private Wealth Team.
- Spreadsheet development, oversight and management.





Qualifications, Skills & Experience

- Experience in fundamental and quantitative research and analysis.
- Experience assisting in or managing portfolios in either a segregated or pool fund environment.
- Experience in non-traditional/alternative asset classes, with preference for impact investing experience.
- Strong written and verbal communication skills.
- Ability to multi-task while remaining organized.
- Strong attention to detail.
- Strong mathematical background and computer skills.
- Completion of CIM or CFA (CFA preferred).
- Currently registered or registrable as a Portfolio Manager.
- Travel may be required.

Please forward your résumé and cover letter in confidence to careers@capstoneassets.ca. Capstone thanks you for your interest; however, only candidates selected for an interview will be contacted.

