

Capstone Asset Management Inc. is a Portfolio Manager, Investment Fund Manager and Exempt Market Dealer serving clients in British Columbia, Alberta, Manitoba, Ontario and Quebec. Holding to Biblically informed values, we provide discretionary investment management and mandate specific solutions to clients including high net worth individuals and families, institutions, pensions, foundations, family offices, and third-party Portfolio Managers.

Title: Portfolio Manager/Senior Analyst

Reporting to: Chief Investment Officer

Location: Langley, British Columbia

Summary of Position

Capstone seeks a Portfolio Manager/Senior Analyst who, as part of the Investment Management Team and Investment Committee, will provide fundamental, quantitative and technical research and analysis to assist in managing the seven proprietary funds. Your background as a Portfolio Manager/Senior Analyst, coupled with your technology expertise, will provide the platform for you to further develop our existing technology to enhance our research and portfolio management. Capstone is looking for a self-starter and organized team player who aligns with our philosophical values.

Duties and Responsibilities

Research and Analysis:

- As a member of the Investment Management Team, you will provide analysis of a wide range of potential and current investments including qualitative and quantitative reports, screens, and analytics to support the work of developing stable and profitable portfolios within the company's seven proprietary funds.
- Provide risk metrics and analysis of the current pools.
- Research and assess new traditional and non-traditional investment opportunities for existing and future pools.
- Execute trades as necessary within the pools.
- As a potential voting member of the Investment Committee, provide analysis, insight and decisions on asset allocation, along with buy/sell decisions in our proprietary funds.
- Make asset allocation decisions within the current pools in collaboration with the Investment Management Team.
- When appropriate, provide commentary on pool holdings, economics and market conditions.
- Support the needs of the Private Wealth Portfolio Managers in the service of Capstone clients.



Technical Oversight:

- Development and maintenance of tools that generate robust and accurate reporting on investments, economic data and our proprietary funds.
- Automation and preparation of internal and external documents to serve clients and Portfolio Managers. Work alongside third-party research and operations professionals to define useful workflows.
- Support data, research, and pool information needs of the Private Wealth Team.
- Freedom to translate or replace VBA applications with Python-based tools and to direct the development of data management and analysis tools with some freedom as to the choice of technology.
- Experience in SQL Server administration, troubleshooting, building SQL queries, stored procedures, and designing and/or updating database schemas.
- Working knowledge of Microsoft SQL, DHTML, JavaScript and CSS.

Qualifications, Skills and Experience

- Experience and/or advanced education in fundamental and quantitative research and analysis.
- Strong mathematical and statistical background.
- Ability to be registered as a Portfolio Manager would be an asset.
- Experience in mortgage underwriting would be an asset.
- Experience with Real Estate investing.
- Strong written and verbal communication skills.
- Ability to multi-task while remaining organized.
- Strong attention to detail.
- Willingness to complete industry courses.
- Travel may be required.

Please forward your cover letter and resume in confidence to careers@capstoneassets.ca.

Capstone thanks you for your interest, however, only candidates selected for an interview will be contacted.

