

# FINANCIAL ANALYST

## ROLE SUMMARY

The Financial Analyst researches potential investee fundamentals to make business, sector, and industry recommendations. He/ she can also recommend a course of action for investment. The analyst must be aware of current developments in the focus industries (agriculture and basic services), as well as, prepare financial models to predict future economic conditions for any number of variables.

## ORGANIZATIONAL RELATIONSHIP

### Internal

- Reporting to Investment Manager

## COMPETENCIES

- Strong in financial analysis
- Strong business research skills
- Strong verbal and written communications skills
- Ability to work collaboratively and diplomatically with external and internal customers
- Proficient with spreadsheets, relational databases, and statistical and graphical packages
- Proven communication skills – writing, speaking, and presentation
- Critical thinking skills
- Effective leadership with demonstrable sharing of best practices
- Strong listening and consultative problem-solving skills

## EDUCATION AND EXPERIENCE

- Bachelor of Science in Accounting, Business Management, Economics, or Mathematics.
- MBA/CPA has an advantage
- At least three (3) years work experience in analysis of financial data, preferably in a bank, financing institution or investment house.

## DUTIES AND RESPONSIBILITIES

1.To research the macroeconomy and microeconomics conditions in focus industries such as but not limited to agriculture (e.g. rice, coffee, coconut, fishing) and basic services (renewable energy, water, health, employment)

2.To consolidate and analyze financial data (financial statements, budgets, forecasts etc.) in terms of feasibility, creditworthiness, and risk associated with investment decisions.

3.To determine whether certain deals are feasible based on the fundamentals of the social enterprise subjected to due diligence and make recommendations to senior management as to whether or not a certain investment is appropriate.

4.To develop detailed presentations and financial reports that include forecasting, cost-benefit analysis, trending, and results analysis of investment pipeline and PEH investees.

5.To perform field visits and monitor the financial and social impact performance of investees based on submitted monitoring reports.

6.To assist in the preparation of internal documents such as investment reports, deal agreements, board meeting kits, presentations, and minutes.

Corresponding job description is available at [www.pef.ph](http://www.pef.ph). Interested applicants may email their application letter, updated CV and transcript of records at [recruitment@pef.ph](mailto:recruitment@pef.ph). Applications will close on October 30, 2024.