

RESEARCH ASSISTANT

Sprucegrove Investment Management Ltd. is a Toronto-based investment management firm with a value style, specializing in Global equities for institutional clients. We are registered in Canada as a Portfolio Manager and, as applicable, an Investment Fund Manager with nine provincial securities commissions/regulators, including our principal Canadian regulator, the Ontario Securities Commission (“OSC”). Sprucegrove is also registered as an investment adviser with the U.S. Securities and Exchange Commission (“SEC”).

As a Research Assistant, you will support the project and operational needs of the Research and Portfolio Management teams. Responsibilities will include compiling and inputting data financial data and preparing reports to ensure timely and accurate reporting to stakeholders. Other responsibilities may include assisting Investment Analysts with basic preparatory work, as required.

The ideal candidate for this role would typically be interested portfolio data, analytics and reporting.
Please note this is not an investment analyst role.

What you will do

Reporting to the Manager, Research Assistants Team, the Research Assistant’s responsibilities will include:

- Preparing financial spreadsheets and research assignments.
- Processing large data sets to perform calculations, identify anomalies, and/or produce new reporting capabilities.
- Maintaining an accurate database of current and prospective investment holdings.
- Leverage efficiencies to enhance sourcing, accuracy and timeliness of research data.
- Supporting the proxy voting program through analysis and administration for investment holdings.
- Supporting ESG deliverables including reporting and completing questionnaires.
- Collaborating with other departments to complete monthly and quarterly reporting.
- Completing daily and monthly reporting as required and contribute to process improvement.
- Conducting screening of research ideas utilizing established criteria.

What you will bring

- Undergraduate degree preferably in Finance, Math, Accounting or Economics
- Demonstrated knowledge of accounting and financial statements, investment concepts and financial markets
- Advanced skills in Excel (including VBA), PowerPoint, Word
- Experience utilizing tools such as FactSet and Bloomberg
- Exceptional interpersonal and communication skills (verbal & written)
- Ability to multi-task and be resourceful.
- Highly organized and results-orientated with strong attention to detail and accuracy
- Motivated, self-starter, customer- focused and team-oriented individual with strong research and analytical skills

Our employees are the foundation of our success with a focus on always doing what is right for our clients. We are proud of our diverse and unique backgrounds and respect the rights of all to be treated with dignity and respect.

All employment decisions will be based on merit, skills, performance, and business needs. We encourage applications from all qualified individuals from a variety of backgrounds. Applicants may notify us of any accommodations needed to support participation in the recruitment process.

We wish to thank all applicants for their interest and effort in applying. Please note only candidates selected for interviews will be contacted for this position. Interested applicants can forward their applications (resume & cover letter) to: careers@sprucegrove.com