

Analyst – Job Description

Upside AI is a tech-based investment management company. Upside AI was founded on the idea that technology will make better decisions over humans in the long run and is therefore building India's leading tech-first asset management platform.

In the two years since Upside AI has been live, we have delivered best in class returns for investors and grown our AUM to Rs 600 mn organically. We have raised a round of funding from marquee investors like Endiya Partners, Vijay Kedia (veteran public markets investor), Ajay Nanavati (ex-Chairman, Syndicate Bank) and Gopichand Katragadda (ex-CTO of Tata Group).

We are looking to expand the team and hire an Analyst. If you are interested in the role, write to us at careers@upsideai.com

Job description

- Gathering, clean-up and analysis of both macroeconomic and company-level data from a variety of sources, including company reports, the internet, online databases like Refinitiv Eikon, Capitaline etc.
- Building, maintaining and analysing financials and business of companies and industries without errors in a timely manner; generating regular and one-off reports, graphs and datasets from these models
- Understand relationship between income statement, balance sheet and cash flows. The Analyst should be able to build a model independently and be able to explain key trends and assumptions
- Analyse corporate governance standards in companies and present summary based on well-defined frameworks
- Top-down analysis of industry and macroeconomic trends
- Writing content (earnings, text, tables, presentations and charts) for company reports, articles and blogs to be used both externally and internally.
- Tracking portfolio performance and preparing portfolio reports for clients
- Maintaining regular contact with other analysts at investment firms and research houses to be able to conduct channel checks on companies, taking part in conference calls and responding to project requests
- Assume end-to-end responsibility for all analyses, projects, and presentations

The Successful Applicant

- 3-5 years relevant experience; preference for candidates who have buy-side equity or PMS experience
- Educational qualification: B.Com or B.Tech from premier institutions (minimum) + CA/ CFA/ MBA (preferable)
- Financial literacy, proficient in Microsoft Excel/Word/PowerPoint, good communication skills (English and Hindi)
- Self-starter with attention-to-detail and ability to adapt in a dynamic work environment
- Passion for financial analysis and enthusiastic to build a tech led AMC from the ground floor

Compensation

- Outstanding package and incentives