# Equity Research Analyst Job Description

**Duties and Responsibilities:**

- Maintenance of macro and industry data series as well as company specific financial models
- Partner with the senior analyst in charge, and work within a focused industry team of associates to cover group of 15+ stocks, including small, mid, and large cap companies
- Responsible for scrutinizing and projecting company financials, as well as perform valuation analysis
- Responsible for synthesizing data to generate new investment ideas and/or propose investment action to investment officers and account administrators concerning assigned corporations or committees
- Communicate key findings and recommendations to appropriate unit/team
- Conduct assessment on environmental, social, and governance (ESG) risks, and opportunities
- Responsible for the planning of industry, sector, and company reports and presentations for internal and external clients
- Responsible for managing client requests
- Participate in industry and company sponsored conferences and field trips
- Responsible for initiating research and apply multiple sources, including annual or industry reports, trade journals, technical periodicals, and brokers and management reports to conduct research relating to the investment suitability of various securities
- Stay abreast of trends in business conditions and/or monetary policy that could affect the investment market.

**Equity Research Analyst Requirements – Skills, Knowledge, and Abilities**

- Education: Applicants for the equity research analyst role require a minimum of Bachelor's degree in Business, Finance, Accounting, or Economics
- Certification: Recruiters may prefer to hire individuals with an advanced degree or CFA certification
- Knowledge: Applicants must possess a strong financial background with knowledge of financial modeling, and ability to dissect financial reports and perform valuation
- Critical thinking skills: They are also required to have idea generation and thought leadership abilities. It is important that equity research analyst can synthesize data as well as apply logic and reasoning to decipher the strength and weakness of a problem, and generate new investment ideas or recommend investment decisions
- Interpersonal skills: They are also expected to possess strong interpersonal skills for establishing and developing relationships with multiple stake holders, including senior management of assigned companies, team members, and other internal and external securities professionals
- Attention to detail: Applicants must have high attention to detail to ensure consistent accuracy in all work documents and data used to arrive at a valid conclusion
- Teamwork abilities: It is essential that they can work effectively in a team oriented environment to effectively collaborate with the sales, client service, and trading teams
- Strong communication skills: It is essential that applicants possess exceptional reading, writing, and oral communication skills necessary for them to read detailed work documents, author thought provoking differentiated sell-side equity research; write objective reports and verbally communicate information clearly and effectively to others
- Quantitative skills: It is also vital that they are highly numerate individuals with the capability to work with large data to derive fact-based insights
- Computer skills: They must possess advanced computer skills, especially proficiency in Excel, with financial modeling experience, PowerPoint, and word.