Financial Research Analyst Job Description

Duties and Responsibilities:

- Investigate financial statements of businesses to determine their net worth
- Responsible for managing funds and financial portfolios
- Communicate potential risks in investment proposals to management
- Stay current with recent software and technologies capable of predicting the financial future of the industry (e.g. healthcare, banking, or real estate) they specialize
- Monitor and manage the company's stocks and proffer suggestions to management/ relevant authority regarding whether to sell or to invest
- Ensure that the company complies with risk management protocols
- Study periodical and annual financial statements to evaluate the estimated future earnings of the organization
- Partake in investors meetings and interact with senior financial and management teams
- Carry out original research on new datasets
- Spot and research prototype predictive products
- Become skilled in writing production-ready code to identify interesting outliers, anomalies, correlations, and associations
- Responsible for the preparation of financial reports and investment recommendations.

Financial Research Analyst Requirements – Skills, Knowledge, and Abilities

- Education: To work as a financial research analyst, applicants are required to have a minimum of Bachelor's degree in Finance or Economics or in a closely related field

- Knowledge: They should have solid financial background and a minimum of 2 years work experience in the financial services industry
- Certification/Licenses/Registration: It is an advantage to the applicant if they have a professional certification like CFA. Some recruiters lookout for applicants with Series 7 or willingness to obtain it within the first 90 days of employment
- Communication skills: It is important that applicants have exceptional verbal and written communication skills to communicate effectively, and also prepare reports for management
- Attention to detail: To guarantee the validity of analyses, it is important that applicants are detail-oriented individuals to achieve a high degree of accuracy
- Organizational skills: It is also important that applicants can balance multiple projects under pressure amid tight deadlines
- Quantitative and analytical skills: The job of a financial research analyst requires them to analyze financial statements to support investment decisions. So it is important that applicants are highly numerate individuals with strong analytical skills and the ability to interpret and draw meaningful conclusions from large data sets
- Self-starter: Applicants must be self-motivated individuals with the ability to work independently or with little supervision.