

# Investment Banking Analyst Job Description

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## **Duties and Responsibilities:**

- Undertake client specific industry research on investment opportunities
- Responsible for conducting preliminary valuation work
- Responsible for developing valuation analyses and models, including projections, LBO, DCF, public comparables, historical M&A transactions, etc.
- Responsible for the compilation of prospective acquirer lists
- Provide support to senior bankers, such as training, recruiting, etc.
- Provide assistance to members of the investment banking group when assigned
- Perform valuation analysis and financial modeling for prospective and on-going transactions
- Assist in developing and preparing proposals and presentations to clients and prospects
- Maintain M&A precedent transaction database
- Execute the detailed tasks involved in all phases of M&A and private placement engagements
- Undertake financial, business, and market analysis with emphasis on reformatting financial statements and benchmarking key performance metrics.

## **Investment Banking Analyst Requirements – Skills, Knowledge, and Abilities**

- Education: They require a Bachelor's degree in Finance, Accounting, Business, or Economics
- Experience: They may be required to possess 1 – 2 years of investment banking experience. The experience required includes internships experience because the analyst role is usually an entry level position

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- Knowledge: They require basic accounting knowledge; familiarity with accounting and corporate finance concepts and financial statement analysis; and they must command skill sets, including financial in the fundamentals of valuation, business strategy, and client communication skills, to perform their job successfully. They must also have the knowledge of performing DCF Valuations and preparing pitch books
- Certification: This is not a requirement but earning a Chartered Financial Analyst (CFA) certification or other financial certification is a plus to your application
- Excellent financial and data analysis skills: Individuals interested in the investment banking analyst career require strong analytical skills to evaluate data effectively
- Investigative skills: They require strong research skills to gather all the information necessary for them to reach an informed conclusion or decision about an investment opportunity
- Strong critical/strategic thinking: Their job requires them to continually seek ways to improve on the client/organization's portfolio; hence it is vital that they can think through available options with a long-term perspective
- Attention to detail: They must pay close attention to details to ensure accuracy of data or information before deciding on the course of action to be taken
- Computer skills: They require strong knowledge of Microsoft Office applications, especially proficiency with Excel and PowerPoint
- Communication skills: Investment banking analysts require excellent written and oral communication skills to effectively make presentations of findings, prepare documents, and relate with clients. They must be able to adapt their communication style to different audiences
- Team player: They must be able to work in a team oriented environment as well as collaborate with relevant others to deliver results
- People skills: They must be able to relate with people of different background and personalities; as well as be able to influence clients to meet with them.