

Stock Analyst Job Description

Duties and Responsibilities:

- Utilize data analysis to predict the future earnings of the company and advice management/clients on whether to make stock sales or purchase decision
- Provide support to senior stock analysts and portfolio managers in the evaluation of current and potential investments that align with the qualitative investment criteria of the fund
- Execute evaluation annual reports, quarterly conference calls, and newspapers, and sell-side brokerage reports, etc.
- Conduct interviews with management, suppliers, and competitors, and customers
- Evaluate variables such as regulatory actions and changing industry dynamics that may impact on the stocks of the company/clients
- Responsible for digging up information on proposed and existing investments to equity analysts and portfolio managers
- Responsible for developing and updating economic and valuation models and other statistical analyses
- Responsible for stock screening to find undervalued companies and conduct initial research and write-ups on companies
- Participate in industry conference, annual general meetings, and other events as needed.

Stock Analyst Requirements – Skills, Knowledge, and Abilities

- Education: Applicants are required to have a minimum of Bachelor's degree to work as a stock analyst, and an MBA is often preferred
- Knowledge: It is essential that they have strong financial acumen with the ability to analyze balance sheets, parsing footnotes, and value companies. Recruiters may also request for individuals with risk analysis skills and a working knowledge of investment banking or work

experience in an investment banking training program, investment management or consulting companies etc.

- Also, applicants should be knowledgeable in equity investment strategies and valuation methodologies. An understanding of valuation techniques is considered a plus to the applicant
- Certification/License: Employers may request for CFA and Series 65 license as a requirement to be hired as a stock analyst
- Research skills: The stock analyst job requires that they research stocks of companies and other variables that may affect the profitability of the proposed and existing investment. So, it is important for applicants to be able to use primary and secondary data sources to scrutinize investment opportunities across multiple sectors
- Computer skills: Stock analysts also work with computers, so it is important that applicants are skilled in the use of Microsoft Office applications like Word and Excel
- Self-starter: Applicants should have the ability to work independently and report findings confidently to the rest of the investment team
- Applicants should be detail-oriented with demonstrated interest in public equity investing
- Communication skills: They should possess outstanding writing and verbal communication skills necessary to work in a team environment, as well as possess the capacity to author exceptional differentiated sell-side equity research
- Organizational skills: They also need to have the ability to handle multiple tasks while working independently or across teams
- Analytical skills: It is important that applicants for the stock analyst job have the mental capacity for generating investment and trading ideas, as well as thought leadership abilities. They must also be able to apply logic and data analysis to analyze complex issues and make sound decisions.