

A full-time Data Analyst is required to join a small and well-established middle office team within McInroy & Wood Limited, a leading independent private client investment manager based in Haddington, East Lothian. McInroy & Wood manage £2bn worth of clients' investments, which are invested directly around the world. We are proud of our collegiate approach and strive to build a diverse team, recognising the many benefits that this brings to our clients and colleagues.

Key attributes

The role principally involves the preparation and analysis of data across a range of scenarios to inform the decision-making of the investment team with an increasingly wider scope. Data Analysts directly support Investment Managers in reporting activities. Contributions to firm-wide initiatives and operational projects also form part of the role. The successful candidate will receive training as well as mentoring, and support in completing professional qualifications.

Working in a largely private client environment, the candidate will have a meticulous nature, strong communication skills and will work to a high standard of accuracy. A grounding in Microsoft Excel is essential. The successful candidate will be a proactive individual, who will use their own initiative and problem-solving skills to seek to enhance the department's performance and contribute to the success of the firm.

Responsibilities

- The role, based in Haddington, will involve assisting the investment team in a wide range of tasks, including:
 - Preparing and analysis of regular and ad-hoc client and fund performance statistics
 - Creating and updating presentations for existing and new clients
 - Working alongside the operations team in ensuring smooth running of our front office system
 - Analysis of existing and potential client information
 - Assisting investment managers and dealers with the preparation of investment plans.
- Developing a data culture across McInroy & Wood.
- Supporting the development of efficient processes and ways of working.
- Attain IMC and further qualifications.
- Participating in project work and broader firm-wide initiatives (e.g. net zero reporting).

Essential Competencies & Skills

- Undergraduate degree classification of 2:1 or above, in a quantitative discipline e.g. finance, economics, maths, statistics, physics, (predicted if degree not yet complete).
- Proficient in Microsoft Excel.
- Strong attention to detail and ability to work to a high standard of accuracy.
- Strong numerical, analytical, and problem-solving skills.
- Organisational skills and the ability to meet deadlines and manage multiple tasks.
- Team worker with proactive and flexible approach.

Preferred Competencies & Skills

- Understanding of financial markets and events.
- Knowledge of optimal database structures.
- Experience using Bloomberg Terminal, Dynamics 365.
- Experience using Power BI.
- Understanding of Python (preferred) or R.

What we offer

Salary:	Competitive.
Holidays:	25 days per year, increasing to 30 days depending upon time spent with company.
Pension:	Group personal pension scheme, defined contribution. Company contributes 7% of salary p.a. We offer a pension salary exchange arrangement to all active scheme members.
Healthcare:	Private healthcare insurance.
Life Assurance:	4x Death in service.
Training:	All training costs and professional qualifications will be covered by the Company.
Social Commitment:	Opportunity of paid leave for volunteering and charity work.
Workplace:	A friendly, supportive environment in bright and modern office premises. Free on-site car parking with access to an EV charger.
Hybrid Working:	Upon completion of training, there is the opportunity to transition to our hybrid working model, requiring 3 days per week in the office.

To apply

Please send your CV and covering letter of no more than 500 words, explaining why you wish to pursue a career with McInroy & Wood to: recruitment@mcinroy-wood.co.uk.

Please note that we are currently unable to sponsor candidates for this position.

Closing date: 16 February 2025