

नेपाल धितोपत्र बोर्डबाट मर्चेन्ट बैंकरको रूपमा कार्य गर्न अनुमतिपत्र प्राप्त संस्था



गारिमा क्यापिटल लिमिटेड GARIMA CAPITAL LIMITED

(A Subsidiary of GARIMA BIKAS BANK LIMITED)

समृद्धिको सारथी 

TERMS OF REFERENCE

Functional Title: Head - Investment Management

Corporate Position: Assistant Manager

Required No: 1

Garima Capital Limited is a Merchant Banker, licensed by Securities Board of Nepal (SEBON) to render 'Portfolio Management Services' (PMS). It has also obtained Depository Participant License from CDS & Clearing Ltd. to render DP Services. Company is on the verge of obtaining full-fledged Merchant Banking License including Mutual Fund Manager License. The Company is located at Kamal Pokhari Ward-01, Kathmandu, Nepal.

Our core team comprises of qualified finance professionals which shall enable us to provide prompt and thorough service to our valued Clients. We encourage an open and collaborative working environment in which everyone has the opportunity to deliver her or his best. We foster professionalism, excellence, cooperation among our employees and high standards of business ethics.

Position Summary:

The position holder is responsible to take both direction and work intuitively to maintain a favorable public image of the Company. The work area includes Investment Management Department where the position holder shall be involved in managing PMS unit, Mutual Fund Unit and Business Development Unit.

We are looking for a well-organized and analytical Head - Investment Management to manage our Company's as well as client's investment portfolio and mutual funds. The candidate will provide insight and direction, lead investment teams, complete transactions for all funds, and effectively maintain portfolio developments. You will be the front of the company and should have the dedication to create and apply an effective sales strategy and help us expand our clientele.

To excel in this position, you need to possess a sound understanding of all investment policies and guidelines, demonstrate excellent communication skills (written and verbal), and maintain a strong professional work ethic.

Duties and Responsibilities:

The duties and responsibilities of a *Head – Investment Management* includes:

- Establish effective and well-organized investment processes.
- Write clear and well-informed investment recommendations based on thorough research and analysis.
- Organize regular investment reports and reviews, including quantitative and qualitative portfolio studies.
- Lead the investment strategy unit within the company.
- Verify 'Investment Performance and Evaluation Report' on periodic basis.
- Verify Investment Policy Statement (IPS) of client(s).
- Co-involvement in preparation of 'Scoreboard' on periodic basis.
- Assist in the macro-economic analysis and capital market expectations on periodic basis.
- Develop mutually beneficial relationship with the market participants to get insights of the market.
- Maintain integrity, objectivity and follow disciplined investment approach. Acknowledge the several behavioral biases and try to be as unbiased as possible.
- Examine and assess economic and market trends, earnings prospects and various other indicators and factors that helps to determine suitable investment strategies.
- Analyze policies and circulars issued by Nepal Rastra Bank, Insurance Board, Securities Board of Nepal and other regulatory bodies.
- Keep informed and updated with the latest happenings and developments in and around the world.
- Collaborate with other members of the Department to form a well-designed plan to attract and retain the clients.
- Determine the optimum investment strategy, to be taken under different market environment and movements.
- Facilitate in providing trainings and seminars to the Investment Department Team and share the investment vision that helps in strengthening the investment approaches.
- Keep up-to-date knowledge about current Financial Market/Securities news to comprehend and interpret complex financial data; also, about country's economy as well as global economic perspective.
- Manage/mitigate unforeseen risks in an efficient way.
- Develop and maintain excellent work relationship with team members and client(s).
- Design portfolios based on reporting requirements of guidelines set forth by the reporting authorities.
- Evaluate the potential investment opportunities based on historical performance and current market conditions to determine their risk level.
- Monitor changes in legislation that may affect mutual funds or their customers.
- Analyze the company's financial growth potential, risk factors whether it is good for investment or not.
- Ensure effective and smooth client acquisition and enrollment process.
- Review and monitor client satisfaction index.

- Increase the value of current customers while attracting new ones.
- Find and develop new markets and improving sales.
- Develop goals for the development team and business growth and ensure they are met.
- Train personnel and helping team members develop their skills.

Qualification and Experience:

- CA/ACCA/CFA/MBA or equivalent.
- At least 3 years of experience in relevant field.

Required Skills and Attributes:

- Excellent communication and interpersonal skills.
- Dealing capacity with different nature of client(s).
- Confident presentation abilities.
- Strong work ethics and positive attitude.
- Strong knowledge of investment and securities market of Nepal as well as International and latest development around the globe.
- Strong knowledge of financial and investment products.
- Time management and planning skills.
- Ability to flourish with minimal guidance, be proactive, and handle uncertainty.
- Strong analytical, problem-solving and decision-making skills.
- Strong fundamental and technical analysis skill.
- Strong mathematical and numerical skills.
- A flair for statistics and data manipulation.
- Sound understanding of financial analysis, investment strategy and risk management.
- Client-centered focus.
- Tenacity and drive to seek new business and meet or exceed targets
- Flexible to travel to meet clients as required.
- Leadership and team work.
- Punctual and Motivated.

Salary and Benefits:

As per Company's Policy.

How to apply:

Interested candidates are requested to send their formal application to recruitment@garimacapital.com by **12th September, 2022 (27th Bhadra, 2079)** before 17:00 hours.

Selected Candidates are required to attend interview. The company retains the right to reject one or all applications without assigning any reason whatsoever.