UCLA Investment Company

Position: Investment Analyst - Marketables	Team: Investments - Marketables
Position type: Full-time, exempt	Salary Range: $75,000-$80,000 per year

UCLA Investment Company:

The UCLA Investment Company, established in 2011, oversees the endowment of the UCLA Foundation. The portfolio is a global, multi-asset class portfolio. The purpose of the endowment is to support the educational mission of UCLA by providing a reliable source of funds for current and future use. The UCLA Foundation promotes philanthropy and manages resources to advance the campus mission of teaching, research, and public service.

Investment Analyst Overview:

The Investment Analyst will support the mission of the Investment Company by ensuring the endowment is invested in a manner that both (i) provides steady funding for the university and (ii) preserves the real value. The Investment Analyst will contribute across the full investment process, including data management, manager selection and monitoring, performance analysis, and broader portfolio management responsibilities.

The Investment Analyst's responsibilities will be devoted to Public Equity and Independent Return strategies (including hedge funds, liquid fixed income and credit, private credit and other illiquid non-equity investments), collectively "Marketables". The Investment Analyst will work closely with and report to the senior Marketables investment team. The Investment Analyst will have exposure to a wide range of strategies in the portfolio - Public Equity, Fixed Income, Private Credit, Private Equity, Venture Capital, and Real Assets through interactions with the rest of the investment office.

This position is based in Los Angeles, CA and an immediate start date is strongly preferred. Progress toward the CFA designation is expected, and the company offers full sponsorship of exam fees along with structured study support.

Responsibilities:

- **Data Management** – input, organize, and maintain data from existing and prospective managers, as well as for various markets, investment strategies, sectors, and geographies, using Bloomberg and other applications.
- **Board Reporting** – assist in preparing and reviewing regular and ad-hoc materials for The UCLA Investment Company and Foundation Board of Directors.
- **Exposure Monitoring** – aggregate, analyze, and maintain detailed position-level data in manager portfolios across public and private asset classes and produce quarterly geographic, sector, and strategy exposure reports.
- **Portfolio Analysis** – work with the operations and investment team on the critical tools and analysis that support performance assessment and attribution, asset allocation, liquidity management, and risk management.
- **Manager Due Diligence** – play a key role in the team's investment due diligence of potential investments, including note-taking, quantitative analysis of historical performance and portfolio valuation, and drafting investment memoranda.

- **Manager Monitoring** – help oversee existing manager relationships by partaking in manager updates and regularly assess results through performance and attribution analysis, as well as evaluation of underlying investments.
- **Special Projects** – lead research projects related to various markets, investment strategies, sectors, and geographies.

Experience and Qualifications:

- Highest level of ethics, integrity, discretion, and professionalism
- Bachelor's degree required
- Progress toward the CFA designation is preferred
- 0 to 3 years of experience in a highly analytical role (asset management, consulting, corporate/project finance, accounting, or banking)
- Strong Excel skills and preferably working knowledge of financial software platforms such as Bloomberg
- Intellectually curious with a demonstrated willingness and ability to adopt and leverage leading AI technologies to increase productivity, deepen analysis, and continuously improve research and decision-making processes.
- Familiarity with basic financial calculations, statistical concepts, and financial statements
- Excellent time management skills, ability to meet deadlines, and working under pressure
- Superior analytical and quantitative skills, coupled with good judgment and qualitative insight
- Effective communication and listening skills; ability to thrive in a small team
- Ability to take initiative and work independently in problem-solving and project execution
- Willingness to travel as needed
- Interest in investing

UCLA Investment Company offers a competitive compensation package commensurate with the candidate's experience. The Company currently follows a hybrid work model (3 days in office, 2 days remote).

To Apply:

Submit a resume, cover letter and college transcript to information@uclainvestments.org with the subject line: "*UCLA IC Investment Analyst"*. Your cover letter should include a brief (250-500 words) statement describing your investment philosophy and how your academic, professional, and personal experiences have shaped it.

UCLA Investment Company is an equal opportunity employer and welcomes a diverse candidate pool.