



# Smithsonian Institution

## Office of Investments

Please submit resumes to [oiinfo@si.edu](mailto:oiinfo@si.edu) by March 3, 2017.

### **Employer Profile**

The Smithsonian Institution is the largest museum, education and research complex in the world. It consists of 19 museums, 8 research centers, a variety of education and outreach organizations, and the National Zoological Park. The Institution's collection is vast, consisting of over 138 million collection objects. The Smithsonian attracts 30 million visitors annually. It has a growing presence on the internet hosting 107 million unique web visits in fiscal year 2015. It employs 6000 people and has an equal number of volunteers. While most of its organizations are located in the Washington, DC area, it has important facilities in other parts of the United States and around the world.

From its founding in 1846 by an Act of Congress, the Smithsonian's principal mission has been to be "an establishment for the increase and diffusion of knowledge." As a Trust Instrumentality of the United States, it enjoys a unique status and is governed by a Board of Regents composed by law, of the Chief Justice of the United States, the Vice President of the United States, three members of the Senate, three members of the House of Representatives, and nine citizen members. The chief executive officer of the Institution is the Secretary.

The Smithsonian Institution conducts scientific and scholarly research, administers the national collections, and performs educational public service functions. The Smithsonian receives approximately 70% of its funding from the federal government annually with the balance from its Endowment, philanthropic donations, and the proceeds of its commercial activities.

### **Investment Analyst – Smithsonian Institution/ Office of Investments**

The Office of the Investments (OI) is responsible for executing the investment policy established by the Investment Committee of the Board of Regents, managing the asset allocation, manager selection, liquidity and all aspects of the investment process with the objective to sustain the growth, safety, and integrity of the Institution's investment assets. The Smithsonian Institution's endowment is comprised of over \$1.4 billion investment assets. The Endowment is invested with external investment managers according to a long-term investment strategy to support the Smithsonian's operations in perpetuity. The purpose of this position is to participate in the development and implementation of investment strategies and provide analytical and operational support to the Chief Investment Officer and the Investment Officers.

The Analyst will support investment decision making in:

- Assisting Investment Officers in the review of manager performance by monitoring

PO Box 37012, MRC 525  
Washington DC 20013-7012  
202.633.7141 Telephone  
202.312.1969 Fax

performance, analyzing holdings and portfolio strategies, examining risk, forecasting future performance, etc. and participates in meetings with existing and prospective investment managers.

- Preparing monthly and quarterly performance reports and comparing Smithsonian investment performance to that of the market and peers. Reconciling accounts and comparing to manager statements on a monthly basis.
- Conducting analyses on drivers of absolute and relative investment performance, performance attribution, and portfolio characteristics. Conducting complex and authoritative studies, develops and issues reports and executive-level summaries that serve as the basis for management decisions. Provides interpretation of reports and financial data to management and the Investment Committee of the Board of Regents.
- Maintaining portfolio management systems. Maintaining and organizing managers' files.
- Assisting in creation of investment memorandum for manager recommendations to the Investment Committee.
- Conducting research and remain current with global financial markets as well as economic and political trends. Providing summaries of important research to the Investment Committee, senior management and staff.
- Maintaining and creating internal documentation for investment process and procedures.

### **Required Skills**

- Working knowledge of diverse asset classes preferably with experience with an asset manager, plan sponsor, direct investor or highly sophisticated consultant/investment advisor.
- General knowledge of financial principles, modern portfolio theory, asset allocation in traditional asset classes.
- Ability to analyze financial data, identify trends, and anticipate future earnings through complex economic analyses.
- Mastery of a wide range of qualitative and quantitative analytical methods and mathematical models and the ability to apply this knowledge to broad, complex issues and problems.
- Excellent written and oral communication skills in order to develop written and oral presentations, to prepare reports that explain investment proposals and influence and educate attendees and to explain and defend recommendations.
- Ability to work well, with and through others, to accomplish the mission.

### **Required Experience**

- Bachelors degree required
- 0 – 3 years of related work experience

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