

## Job Description: Senior Analyst, Active Public Markets

<b>Title:</b>	Senior Analyst, Active Public Markets
<b>Reports to:</b>	Director, Equity Strategies Lead, Active Public Markets
<b>Company:</b>	University Pension Plan of Ontario (“UPP” or the “Plan”)
<b>Location:</b>	Toronto, Ontario, Canada
<b>Website:</b>	<a href="http://myupp.ca">myupp.ca</a>

### OUR COMPANY BACKGROUND & CULTURE

UPP is the first pension plan of its kind in Ontario’s university sector, proudly serving over 41,000 members across five universities and fourteen sector organizations. Our purpose is to bring greater retirement peace of mind to the university sector by investing with integrity and serving members with care. As a sector-wide plan designed for growth, our doors are open to all Ontario universities.

Together, we’re a team of progressive thinkers and agile doers operating within a fast-paced culture of collaboration and respect. We believe in bringing smart and capable people together to create, solve, and grow with a clear shared vision and values of integrity, inclusivity, ingenuity, and impact. Our culture is intentionally welcoming and purposefully rooted in equity, diversity, inclusion, and reconciliation (EDI&R). We believe diverse teams, perspectives, and lived experiences contribute to better decisions and a better workplace.

As a pension plan, UPP approaches investing through a long-term lens to generate and safeguard value. Our commitment to investing responsibly accounts for material risks that impact our investment portfolio to generate sufficient risk-adjusted returns to meet the pension needs of our members.

Join us in building a bright future for our members, our organization, and each other.

### THE ROLE

This is an exciting opportunity for an exceptional individual to join a team of high performing professionals and make a significant impact.

Reporting to the Director, Equity Strategies Lead, Active Public Markets, the Senior Analyst, Active Public Markets, will build strong trusted relationships and communicate effectively with internal and external stakeholders in support and development of UPP’s Active Public Markets portfolio and strategy, with a particular focus on equity strategies. An inclusive ‘one fund’ mindset will unite the investment team in a shared mission to meet the pension promise, deliver on UPP’s expectations as a responsible investor, and position our investment platform as a key competitive differentiator.

This role is based in downtown Toronto in a hybrid work environment, allowing employees the flexibility to work remotely and in-office (minimum two days per week in-office).

**Note:** The level of this position will be determined based on the candidate’s relevant experience and qualifications; individuals at both the Analyst and Senior Analyst levels are encouraged to apply.

**Application Details:** Cover letters are recommended.

**SPECIFIC ACCOUNTABILITIES**

- Collaborate on the development and monitoring of UPP's Active Public Markets investment strategy on an on-going basis, with a particular focus on equity strategies
- Take an active part in manager review and due diligence meetings
- Contribute to the origination of managers in the universe of strategies listed above
- Perform quantitative analysis on managers to inform manager evaluation and portfolio construction
- Make suggestions and improve the portfolio management of the Equity Strategies program at UPP which includes Active Long-Only Equity strategies as well as Equity Long/Short strategies
- Support broader Public Markets team across an array of investment strategies (hedge fund strategies, credit, etc.) on ad hoc basis
- Participate in the branding of UPP by nurturing relationships with external managers and providers (portfolio management analytical, CRM and document repository platforms, managed account platform provider, etc.)
- Contribute to the building of the infrastructure and tools necessary for external manager analysis and monitoring, and portfolio management
- Partner with other members of the Investment team to assist in documentation review, systems setup, implement business processes and technology solutions
- Collaborate with the Responsible Investment group and other industry participants to integrate and implement UPP's Responsible investment strategy with external managers
- Contribute to UPP's reputation as a respectful employer, partner, and fiduciary
- Play a mentorship role with Public Markets interns, when applicable
- Other duties as required

**QUALIFICATIONS & EXPERIENCE**

- Undergraduate or graduate degree in Mathematics, Finance, Economics, Business, or other related quantitative discipline
- **Senior Analyst:** 3+ years of relevant experience at an investment bank, asset manager, hedge fund, pension plans, or fund-of-funds
- **Analyst:** 1-3 years of relevant experience at an investment bank, asset manager, hedge fund, pension plans, or fund-of-funds
- Excellent written and oral communication skills and a keen ability to convey technical information visually
- CFA, CAIA or any other relevant professional designation or working towards a relevant designation would be an asset

**ATTRIBUTES**

- A passion for markets and in particular equity strategies
- Inquisitive, critical thinker and fast learner
- Detail-oriented with strong analytical and problem-solving skills
- Ownership and self-starter mentality
- Excellent written and oral communication skills and a keen ability to convey technical information clearly and concisely
- A nimble, proactive team player who thrives in a start-up environment
- Excellent interpersonal skills and a positive attitude; able to build positive relationships with UPP and external stakeholders

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- Demonstrated ability to meet high performance standards and maintain a calm, pleasant demeanor in a fast-paced, deadline-driven environment
- Alignment with UPP's desire to be a leader in Responsible Investing, ESG, and climate change

### LIFE AT UPP

**Do work that matters.** We are duty-bound to serve our members' interests, and it's a responsibility we don't take lightly. That's why we've ingrained sustainability in our work from day one—to ensure our members have a resilient future to retire into, both today and for generations to come.

**Stronger together.** Collaboration is how UPP was born, and it's how we work with each other and our partners day in, day out. No one at UPP is just a number (even if they are excellent at math) and every win is a shared win.

**Grow every day.** You'll have the opportunity to work on unique, once-in-a-career projects that maximize your skill set and probably teach you some new ones—at any stage in your career.

**Prioritize wellness.** At UPP, wellness takes many forms. Ultimately, it's about ensuring our people are cared for in the ways that matter to them. Check out some highlights of our inclusive employee-focused benefits program including:

- Defined benefit pension plan
- Flexible hybrid work model
- Work from abroad up to eight weeks/year
- Comprehensive group benefits including medical, dental, vision etc.
- Extended paramedical and mental health service coverage
- Health care and lifestyle spending accounts
- Fertility treatments, paid parental leave, and gender affirmation coverage
- Education Assistance program

***UPP enthusiastically welcomes applications from all qualified applicants and especially invites people with lived experience as an Indigenous person, a person with a disability or as a member of another Human Rights Code protected group that faces barriers to employment to apply. Our goal is to create a barrier-free experience for every candidate throughout the recruitment process, so if you require accommodation at any point during the process, please let us know so that we can make the appropriate arrangements. It would be our honor to work with you to adapt our processes to ensure that you can meaningfully participate.***

UPP respects your privacy. For information on how UPP handles the personal information you provide during the application process, please see our [Job Applicant Privacy Statement](#).