



# Investment Analyst

Investment analysts study financial markets throughout the world so that they can advise fund managers and stockbrokers on the best possible investments. They usually specialise in a particular industry such as retail or pharmaceuticals, or in a particular region, such as Europe or Asia.

## What does the job involve?

- examining detailed financial information about individual companies and their prospects
- building a broad knowledge about the investments available and their profit potential
- visiting companies to gather information about them and their financial performance, such as accounts and profit and loss statements
- using specialist media sources to keep up to date with financial news
- analysing national and international business trends to advise on the investments most suited to particular portfolios (groups of investments)
- assessing the effects of UK and worldwide current affairs on financial markets, including political, economic and environmental issues
- producing financial models and projections
- producing detailed reports and delivering presentations with recommendations for fund managers and brokers
- working for investment management companies, life assurance companies and pension funds, advising them on where to invest, or for stockbrokers or investment banks, helping their clients to plan their investments.

## Routes and choices while at school:

You will need to try to get at least four or more GCSEs at grades 9 to 4 (A\* to C), or equivalent qualifications. These should include English, Science and maths. Other relevant subjects include IT and economics.



## Skills You'll need:

- maths knowledge
- knowledge of economics and accounting
- analytical thinking skills
- ambition and a desire to succeed
- persistence and determination
- the ability to use your initiative
- the ability to use your judgement and make decisions
- thinking and reasoning skills
- to be able to use a computer and the main software packages competently



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## How to get into this role:

You can get into this job through:

- a university course
- an apprenticeship
- a graduate training scheme

## University

- You'll usually need a degree at upper second class or higher. Most degree subjects are accepted, but you may find these particularly useful:
  - economics
  - maths
  - business studies
  - accountancy
  - finance
- If your degree is not related to business or finance, you could do a relevant postgraduate qualification like a master's in business administration (MBA).
- A course with a placement year or a summer internship will give you valuable experience and an advantage when applying for work.

## Apprenticeship

You can get into this job through a senior investment and commercial banking professional degree apprenticeship. This is at level 7, which is equivalent to a master's qualification.

This will usually take about 18-24 months to complete. You will take professional exams as part of the apprenticeship and at the end you will be able to apply for membership of the relevant professional body.

## Further information

### Career tips

You may find it useful to have knowledge of a specific industry for some jobs, for example experience in areas like energy, engineering or life sciences could be helpful.

Language skills, particularly French, German or Japanese, can also be useful if you're working with overseas clients and markets



## Career path and progression

- With enough experience you could move on to be a fund manager.
- You might become a senior analyst, responsible for a team of investment analysts.
- You may become an expert in a particular field, such as surveying or engineering.
- You might become a partner or associate in your firm.
- You could find opportunities to work abroad.

## Rates of Pay

The starting salary for investment analysts is likely to be between £22,000 and £30,000 a year. After some experience you can expect to earn up to around £55,000. After a number of years' experience, you can earn £65,000 to £100,000 a year. Senior analysts can earn more.