

Making Investment Research Easier

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<https://github.com/jonahwoo/sql-project>

The Who, What, and How



CHAMBERLAIN GROUP
FINANCIAL SERVICES

Investment Analyst: Navigating Complexity with Precision

11:024, 1:21 AM

Investment Data Analyst - Irvine, CA 92614 - Indeed.com

\$65,000 - \$80,000 a year

Job type

Full-time

Location

Irvine, CA 92614

Benefits

Pulled from the full job description

Dental insurance

Health insurance

Paid time off

Retirement plan

Vision insurance

Full job description

Opportunity: Investment Analyst

At Chamberlain Group, we do everything in teams because we believe in the collective genius of groupthink: many heads are better than one! The core responsibilities of the Investment Analyst will be to work as part of our Investment Team to support all facets of the investment process, with a focus on areas such as managing Alternative Investment data in our portfolio accounting system, working with clients to access tax and other information about their investments and trading securities. In exchange, you will get exposure to a sophisticated investment platform comprised of best-in-class public and private investment managers.

Success in this position requires:

Superior attention to detail, while maintaining a big picture perspective

Technical mindset for data integration, system maintenance and process improvement

Conversational knowledge of the investment advisory business

Commitment to offering platinum-level client service to internal and external clients

It is essential that the candidate demonstrates a high degree of ownership in the quality of their

work and has an exceptionally professional demeanor. He/she will have direct interaction with our clients. This position is a "Jack of All Trades" of sorts, and some examples of responsibilities include:

- Organizing functions and aggregating information from investment managers
- Maintaining portfolio accounting data for alternative investments
- Supporting tax-related needs such as monitoring KTs or tax harvesting activities
- Tracking distributions for reinvestment
- Ad hoc operational support for the team, especially related to process improvement
- Trading securities in client accounts (mostly Mutual Funds and ETFs)

The ideal candidate would be a quick learner with proficiency in excel/data management and a keen eye for improving processes, as we need someone to streamline data exchange between various systems.

It is important to exude a team player mindset, taking pride in everything from administrative tasks to analytics that support the investment decision-making process to owning the quality of data to working with clients.

Requirements:

- BA/BS degree required with a focus on Business, Finance, Investing or related field preferred. Proficient in Excel; comfortable with VBA; familiar with other coding languages a plus (Python, SQL, C++, etc.).
- Securities trading license preferred, but willing to support obtaining the license.
- Basic experience with the investment advisory business required.
- Must be detail oriented, highly organized, self-motivated, and possess strong time management skills.
- Strong analytical and technical skills are essential.
- High competency in mathematics and financial spreadsheets.
- Competent in Microsoft Office (Word, PowerPoint).
- Excellent written and verbal communication skills.
- Clear understanding of platinum-level client service.
- Committed to working with integrity.

Compensation and Benefits

Base Salary Range: \$65,000 - \$80,000

Chamberlain Group assesses market data to ensure a competitive compensation package for our employees. The base salary for this position is expected to be as stated above at the commencement of employment. However, base salary if hired will be determined on an individualized basis and is only part of the Chamberlain Group Total Compensation Package, which, depending on the position, may also include bonus plans and Company-sponsored benefit programs.

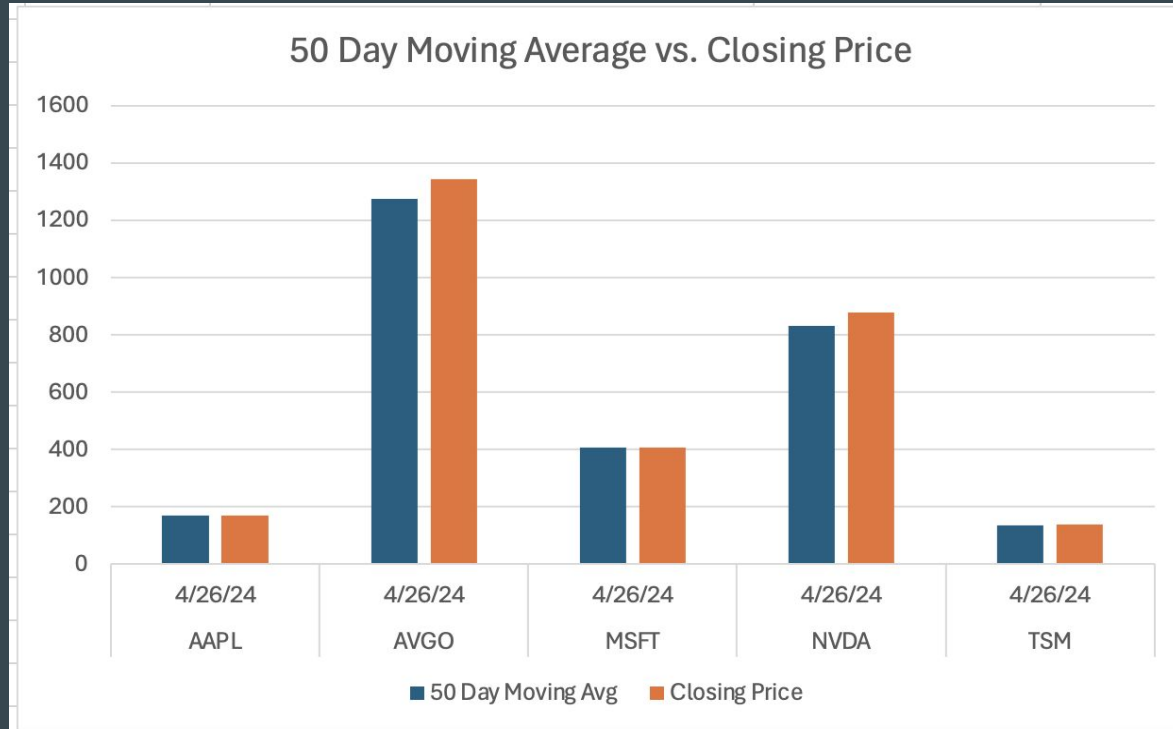
https://www.indeed.com/viewjob?fromrecruiter=sonic_amby-amcnet&fromd=job&id=4275789562731&tk=fr3Mf8rmcrR00

- Analytical skills
- Technical aptitude
- Process optimization

Unlocking Financial Insights: Harnessing the Power of Alpha Vantage API

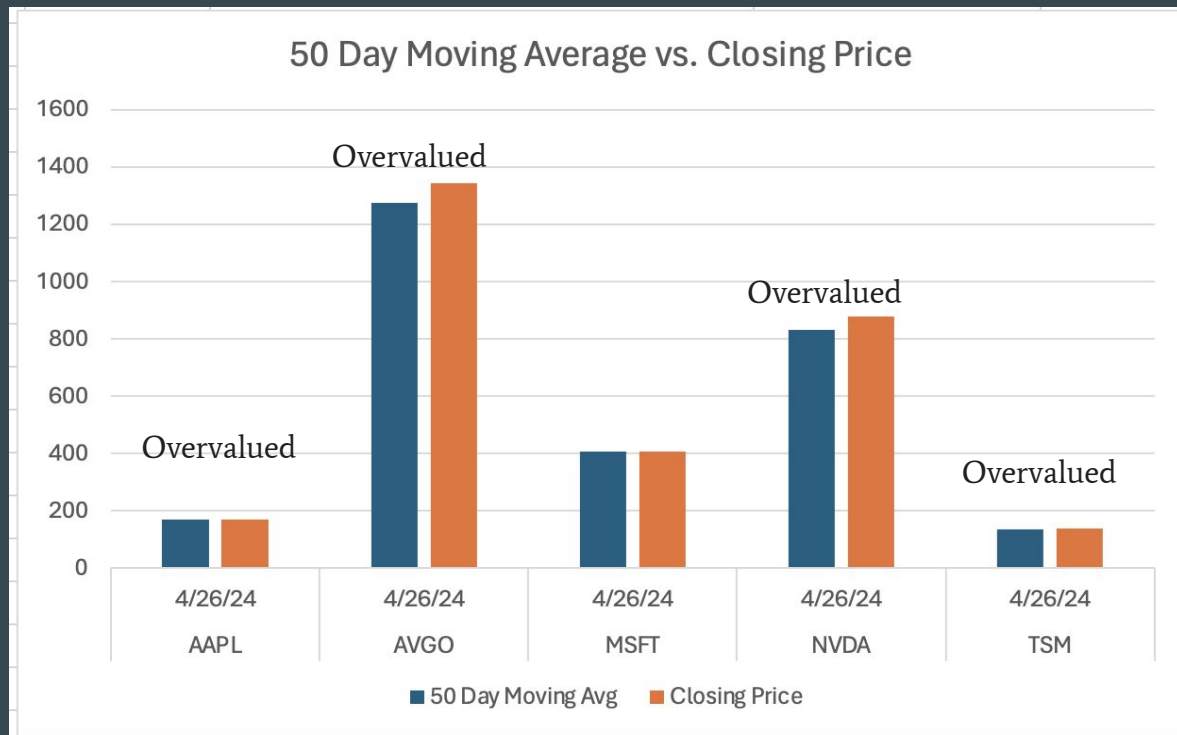


Big Tech Stocks are priced higher than their 50 day moving average



- Wait for the price to drop
- Will have to wait for a while

Overvalued = DON'T BUY

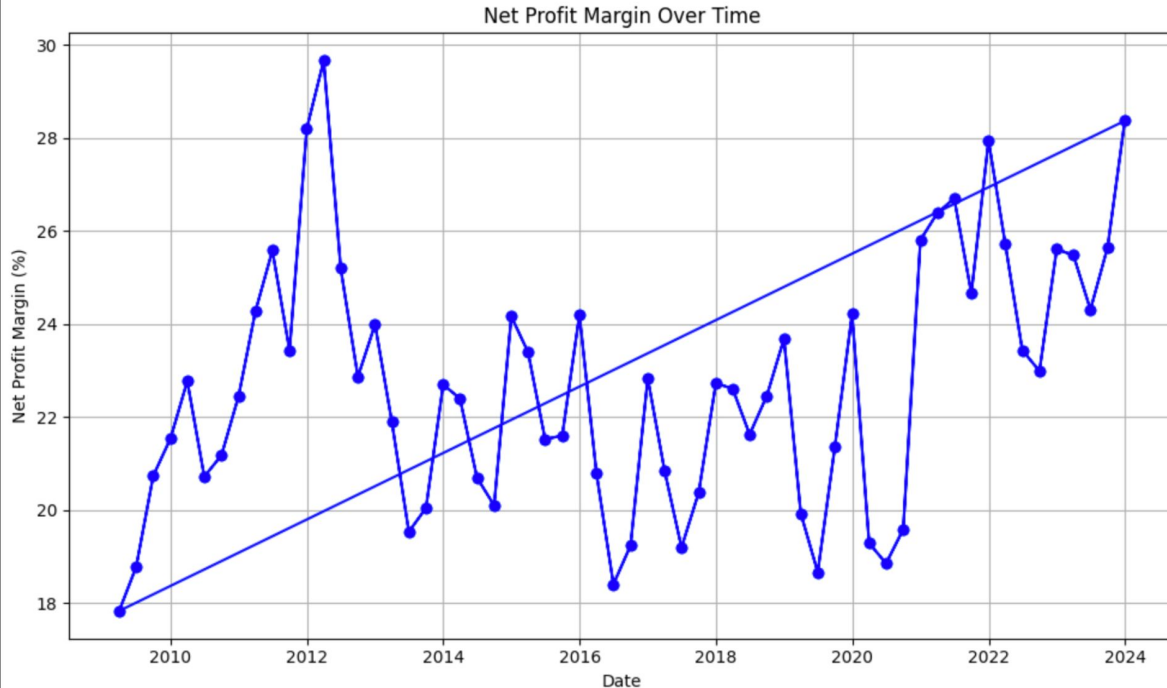


- Buy at or under value
- Continue to be overvalued for a while

Web Scraping Wealth: Unveiling Financial Trends with Macrotrends

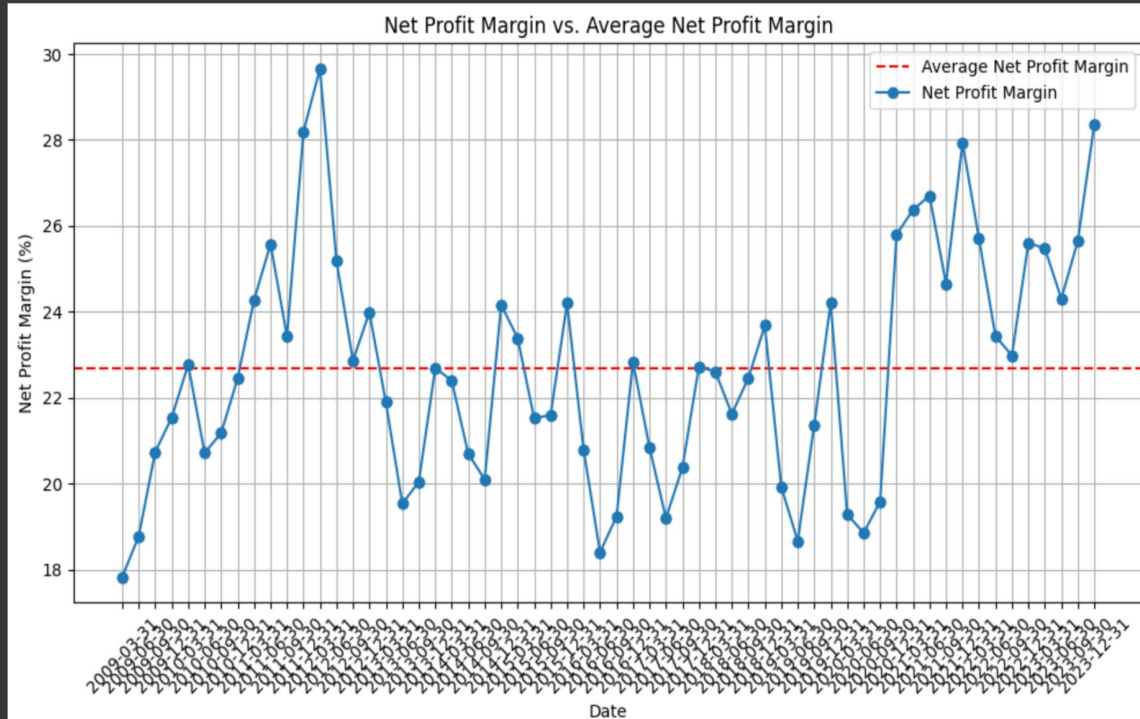


A Positive Trend in Net Profit Margin



- Solid company, solid financials
- Will continue to trend upwards

Be like Apple: Be Above Average



- Long term hold
- Should continue to see above average NPM consistently

Leveraging Alpha Vantage API and MacroTrends to Analyze Financial Trends, Empowering Informed Decision-Making for Strategic Investments

- Stock Data
 - Financial Statement Data
- Big Tech Stocks are currently overvalued, but strong long term