

Equity Research Analyst

Ancora is seeking an Equity Research Analyst responsible for providing professional analysis of financial information; forecasting business, industry and economic conditions that will assist equity managers in making investment decisions for the firm and its clients. This position will focus primarily on the firm's small and small-mid cap strategies.

Location

This position is located in Chicago, Illinois. No remote option.

Duties & Responsibilities

- › Gather and analyze company financial statements in order to assess investment potential.
- › Research industry, regulatory and economic information, as well as financial periodicals and newspapers to learn about related political events, market developments and new investment products.
- › Stay abreast of industry trends and news and other developments related to the assigned securities or sectors. Ensure research being assembled is current and reflects both large-scale and smaller day-to-day changes in the market.
- › Maintain relationships with company management, investor relations consultants and sell-side analysts.
- › Use spreadsheets and statistical software to analyze financial data, identify trends and develop forecasts and projections; use this data to measure risks associated with making a particular investment decision.
- › Interpret data concerning price, yield, stability and future trends. Provide recommendations on investment timing and buy/sell orders to company and/or portfolio managers.
- › Compile reports describing current and long-term trends in economic influences as well as detailed financial data and analysis based on cash flow reports, industry analysis and risk factors.
- › Collaborate with sales, trading and other internal teams, adapting analysis and reporting to specific formats, templates, styles and deadlines.

Qualifications

- › Bachelor's degree in Business, Finance, Accounting or other related discipline required
- › 3+ years of investment industry experience
- › CFP or CFA designation preferred
- › Advanced Microsoft Office application skills including Word, Excel and PowerPoint, with the ability to create custom models and reports
- › Ability to complete research via Bloomberg, Reuters and various online sources
- › Demonstrates a solid understanding of how to interpret financial information and how it applies to making investment decisions
- › Attention to detail, ability to meet deadlines and advanced problem-solving skills

T 216-825-4000
F 216-825-4001

Ohio
Cleveland

Michigan
Detroit

Florida
Naples

- › Ability to think analytically and strategically despite business complexity
- › High degree of organizational skills
- › Ability to effectively collaborate and communicate across multiple functions throughout the organization to promote alignment and drive results
- › Excellent written and verbal communication skills
- › Professional appearance and demeanor

Benefits

Ancora offers a competitive salary and excellent benefit package with a culture of teamwork and recognition.

About Ancora

Ancora is a client-focused and growth-oriented investment and financial advisory firm based in Cleveland, Ohio. The Firm is recognized for providing investment advisory, money management, insurance and retirement plan advisory services to individuals and institutions. Ancora promotes a friendly, family-oriented work environment and encourages our employees to strive for personal and professional growth with the highest level of integrity.

Ancora is an Equal Opportunity Employer

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, protected veteran status, disability or any other basis protected by applicable law.

Visit www.ancora.net for more information.

Apply

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