

## About Entrust Family Office

Entrust Family Office is a leading Multi-Family Office committed to serving ultra-high-net-worth individuals (UHNI) and uber-wealthy families with a comprehensive range of financial and non-financial services, tailored to their unique needs.

### Position Overview: Investment Product Research Analyst

Entrust Family Office is looking for an experienced **Investment Product Research Analyst** to join our Investment Research team in Bengaluru as a key stakeholder and drive the manifestation of our asset class views in the form of investible products and portfolios.

The analyst will also act as a gatekeeper for onboarding any new products on the platform and perform quality checks on those already onboarded. In doing this, he/she should provide research and insights on investment products including Mutual Funds, AIFs, PMS, REITs and InvITs, across Indian and Global markets. The ideal candidate should have strong analytical skills and expertise in data analysis and statistical / quantitative techniques applied to portfolio analysis and performance measurement & appraisal. He/she must be an expert in Microsoft Excel and proficient in using popular databases like ACE MF, Morning Star, Value Research, PMS Bazaar, etc. The Analyst will collect and analyze quantitative and qualitative data of investment products at regular intervals, do a relative comparison and present the outcome for approval. He/she will also prepare and maintain multi-asset model portfolios of various products for different risk profiles and asset allocations and manage them on a real-time basis.

**Job Title:** Investment Product Research Analyst

**Location:** Bangalore

**Experience:** 10+ years

**Job Type:** Full-time

### Key Responsibilities

- **Research** - Conduct quantitative and qualitative research on Mutual Funds, AIFs / PMS, REITs and InvITs investing in Indian as well as Global markets and rank the products accordingly while preparing a list of approved products. The approved list will have to be monitored at regular intervals for any changes or new inclusions. The analyst will be required to prepare comprehensive product notes on the products, categories and themes based on empirical evidence-based research and investment rationale.
- **Quality Control** - Act as a gatekeeper for investment product onboarding by recommending and analyzing new products / schemes with a view on whether the same can be onboarded on our platform or not
- **Portfolio Construction & Management** – Construct and manage (on a real time basis) multi-asset Model Portfolios of investment products for varying risk profiles and asset allocations and present their performance analysis to the Investment Committee

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- **Product Ideation and Sourcing** – Explore investment products available in the market, conduct meetings with the manufacturers and fund managers to understand the investment strategy, security selection and risk management frameworks and share an informed opinion on the same in the form of comprehensive product notes. Also, based on our house view on emerging investment landscape, he/she should suggest new product ideas and help construct customized products in collaboration with AMCs / Investment Managers
- **Collate industry views** on investment markets, across asset classes, present them to the team and participate in internal discussions on the market outlook to help shape our market view

### Key Qualification & Experience

- MBA Finance or CFA (Charter) or Chartered Accountant, with minimum 10 years of experience in investment product research roles with large, reputed Wealth Managers or Investment Managers including Private Banks, Asset Management Companies (AMCs), etc
- Expert knowledge on working and operational aspects of investment products like Mutual Funds, AIFs / PMS and the various factors / levers determining their performance including fees / expense ratios. Knowledge of aspects like taxability of different investment products is needed
- Expert knowledge of quantitative and qualitative techniques used to analyse and appraise performance of Mutual Funds, AIFs / PMS and Alternatives – Indian and Global
- Understanding of market cycles, investment styles, track record of AMCs and Fund Managers including Attribution Analysis of performance (based on factors like Growth, Value, Quality, Momentum, etc.)
- Expertise in MS Excel and usage of key databases / software like ACE MF, Morning Star, Value Research, PMS Bazaar, Bloomberg / Reuters, etc. Ability to code on Python will be an added benefit

### Personal Attributes

- Strategic thinker with intellectual curiosity and global perspective.
- High integrity and client-first orientation.
- Ability to thrive in an entrepreneurial, fast-paced environment.

### Why Join Entrust Family Office

- Be part of a **dynamic and purpose-driven organization** at the intersection of wealth and impact.
- Work closely with **top-tier investors, entrepreneurs, and next-gen leaders**.
- Drive **meaningful change** in the world of Family office and Investments.