Analyst – Job Description

Team:	Corporate Finance & Treasury
Line Manager:	Senior Consultant
Direct Reports:	N/A
Location:	London Office (Kings Cross), 5 days a week. Occasional travel to client sites will be required.
Hours:	Full time, 35 hours per week. Monday to Friday

Purpose and Objectives:

As an Analyst within the Corporate Finance and Treasury (CF&T) team at Altair, you will be responsible for assisting in the delivery of a wide range of financial consultancy services within the UK social housing and charity sector, often via an FCA regulated subsidiary. You will work alongside the existing CF&T team to produce market analysis and insights; assist in financial modelling; and generate reports on the financial operations of clients. The role requires a solid foundation of analytical skills and a willingness to develop a broad understanding of financing within the social housing sector.

This is an entry level position and is suitable for graduates or those early in their career who are excited about the possibility of entering into a finance role, with a focus on impacting society in a positive way.

If successful in the role it is envisaged that the Analyst will be supported to undertake either a recognised corporate finance qualification (CFA, ACT etc.) accountancy (ACCA, CIMA etc.) or with this forming a key part of an Analyst's ongoing professional development.

Key Responsibilities:

Details on the key responsibilities and activities of the role are detailed in the table below.

Key functions	Responsibilities and activities
Corporate Finance and Treasury	• Working alongside the Corporate Finance and Treasury (CF&T) team to model a variety of debt and derivative products. There will usually be a requirement to assist in the analysis of these products and their performance against our clients' key objectives. • Aid in the production of monthly financial reports aimed to keep clients updated on market conditions, ensuring they attain value for money in their treasury operations. • Understand, interpret, and eventually construct policy documents to inform and guide client's treasury operations. • Help to prepare financial analysis of client's financial statements and project cashflows. • Help to analyse and process client's financial forecasts, using the outputs of this analysis to inform a broader treasury strategy.

Key functions	Responsibilities and activities
	• Access and provide economic and market information from Bloomberg Terminal to other members of the CF&T team. • Aid in the day-to-day management of retainer relationships, including collating up to date business information and other administrative elements of these relationships.
Business Planning and financial reporting Support	• Work alongside members of the Finance team to support with modelling and reviewing Business Plans for Social Housing providers using both Excel and Brixx (sector specific modelling tool). • Assist with stress testing Business Plans to ensure that they meet Regulatory requirements and provide stability for organisations long-term. • Work alongside Consultants to ensure that regulatory returns are completed for organisations in preparation for their Financial Year end. • Carry out research and analysis on publicly available Social Housing financial data including financial statements and published sector data including global accounts and sector scorecard data. • Gain an understanding of best practice in sector based financial and value for money reporting and assist in advising clients thereon • Support the team with other finance related projects
Client Engagement	• Engage with clients directly via E-mail, Microsoft Teams and at face-to-face meetings, building positive relationships and ensuring client satisfaction. • Monitor and manage requests from clients with existing relationships, co-ordinating the wider team in the delivery of these requests.
Other/Secondary Responsibilities	• Support Consultants and the Central Bid Management team in the preparation of proposals and pitch books for new business. • Maintain an awareness and up to date knowledge of the Social Housing sector. In particular, any changes to regulatory and market conditions that may affect how clients operate. • Work collaboratively across different service streams in the business when necessary. • Contribute to new product development, working with other members of Altair who will lead these projects. • Assist on certain corporate tasks such as marketing, assistance in organising seminars, developing collateral, knowledge management.
Quality Control	• Provide quality assurance on reporting and analysis undertaken by members of the Finance team. This requires keen attention to detail as spelling, formatting and calculation errors will all need to be identified and highlighted before reports are delivered.
Values and behaviours	• All colleagues within Altair are expected to embody our core values and behaviours. • A strong commitment to the social housing sector and serving social purpose sectors is a fundamental attribute that will contribute to success within the role.

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Person Specification

Section	Criteria	Essential/ Desirable
Education and Experience	Educated to an undergraduate level (or equivalent qualification/experience) in any analytical field (Finance, Business, Economics, Mathematics etc.)	E
	Previous experience working within Financial or Consulting roles would be looked upon favourably but is not essential.	D
Technical Skills	Proficiency in using Microsoft Excel to handle and analyse data, with a comfortable working knowledge of using formulas to create desired outputs.	E
	Experience in using Bloomberg terminal would be favourable but not essential. A desire to learn how to use Bloomberg is essential and will constitute a key part of the role.	D
	Excellent quantitative data analysis skills, with the ability to graphically represent results in an easy to interpret format.	E
	Experience in programming languages (Python, Visual Basic etc.) particularly for the purpose of data collection and processing/cleaning whilst not essential would be viewed favourably.	D
	A basic understanding of how a Treasury function supports a broader business, and some of the key areas that they manage.	E
	A familiarity with basic financial and accounting terminology, with some functional understanding of common analysis metrics and why they might be calculated.	E
	A basic understanding of interest rate derivatives and why organisations might choose to put them in place would be looked upon favourably but not seen as essential.	D
Personal Skills	Strong interpersonal skills and ability to build a professional working relationship with clients.	E
	Effective written communication skills, with the ability to clearly relay technical information to both specialist and general audiences.	E
	Team player who is keen to integrate quickly and work closely within a team as part of a growing business.	E
	Desire to work in Social Value sectors, wanting to positively impact both Altair's clients and the communities they operate within.	E

	Proficient in use of Microsoft Word, PowerPoint, Outlook, and Teams.	E
	Ability to work to simultaneous tight deadlines across multiple projects whilst maintaining a high level of quality in delivered work.	E
	Demonstration of values and behaviours that align with Altair	E
	Commercial acumen and an understanding of the importance of project management to successfully deliver consultancy mandates.	E

Key Relationships

Internal	• Corporate Finance and Treasury teams as well as colleagues within the wider business.
External	• Clients, funders, rating agencies, Regulator of Social Housing