

Performance Analyst

Location: OSAM is located in Stamford, CT; but the hire can live elsewhere and work remotely.

Background:

O'Shaughnessy Asset Management, LLC (OSAM) is a long-only equity manager with \$4.4 billion* in assets under management (AUM). Our firm is an industry leader in factor investing as a result of our robust research team and platform. To continue delivering for our clients, we are always looking for smart, interesting, curious, and hard-working people to join our team.

Description:

OSAM offers an environment where one can learn and develop quickly while making material contributions towards the organization's goals. If you are passionate about investing and enjoy 'learning by doing', then OSAM is the place for you.

As a Performance Analyst you will be responsible for prompt and accurate performance reporting across all accounts and strategies, in addition to developing/producing performance related analytics. Your output will be directly utilized by our portfolio managers, as well as our relationship and business development teams. SQL coding experience (or a sincere interest to learn SQL) is required.

Competencies:

The ideal candidate has strong understandings of math and Excel alongside some level of programming capabilities in SQL and R. Most importantly, the candidate is hungry to learn and work hard.

Why OSAM?

As a firm, OSAM is unique in that it combines all the benefits of a small privately owned firm with the culture and drive of a Fortune 100 company. This hire will not only work closely with their colleagues on the performance reporting team, but also with our portfolio managers, client facing team and programmers. The ability to collaborate across these business channels will fast-track your professional development and investment acumen.

Qualifications:

- Intellectually curious
- Bachelor's degree in Math or other analytical discipline
- High level of attention to detail and ability to perform routine tasks with accuracy
- Highly organized and thorough
- Flexible, able to work independently and in a team environment
- Ability to multi-task and work well under pressure in a fast-paced environment
- Solid understanding of Object-Oriented Programming concepts
- Strong knowledge of relational databases and Microsoft SQL Server
- Strong analytical, mathematical, and problem-solving skills
- At least 2 years of work experience in performance and attribution area is ideal but not required
- Understanding of investment performance calculations is ideal, though not required
- [GIPS](#) knowledge is ideal, though not required

* As of 6/30/2020. The AUM and AUA combined total represents \$4.4 billion of O'Shaughnessy Asset Management assets under management and \$0.4 of assets under advisement. The information regarding AUA is supplemental, OSAM does not have control over the assets under advisement, implementation of the models, or execution of the trades. Numbers may not add up due to rounding.

Firm Benefits:

- Generous Healthcare (medical, dental, vision), 401k match/vesting schedule
- No specified number of days for paid time off
- Ongoing educational benefits – the firm has financed 90% of the cost for graduate degrees for our high performers
- Reap the benefits of CEO Patrick O'Shaughnessy (and others) extensive professional network through easy access and events like Lunch-and-Learn's, etc.
- Flat organization/low bureaucracy

OSAM's Mission:

We pursue a simple mission: learn, build, share, repeat. We constantly strive to learn more about investing, build disciplined strategies that capture the best of what we've learned, and share our broad findings with other curious investors.

Over three decades, we've learned with our clients. We are always seeking to improve the capacity of our platform—including our data, proprietary research, portfolio management technologies, and a highly experienced team. Our goal is to deploy this platform for our clients' long-term benefit.

Our culture is one of curiosity. We hire and promote people driven by a need to understand investing, markets, and our industry while sharing the excitement of that process with others. As a firm, our objective is to bring together a diverse group of knowledge seekers that enjoy learning and always act with kindness and integrity.

By sharing most of what we learn, we hope to help investors of all types make better and more informed decisions, and ultimately build better portfolios. Experience has taught us that constant exploration is contagious. Through a commitment to education we hope to improve the investing discourse globally.

Please visit www.osam.com. Send all inquiries to careers@osam.com.