

JOB OPPORTUNITY

Position: Portfolio, Business, and Data Analyst

Reporting To: AVP, Product

Term: Full-Time

Location: 20 Eglinton Ave West, Toronto

Overview

The **Portfolio, Business, and Data Analyst** will be accountable for retrieving, analyzing, and interpreting data to provide actionable insights for business/client decision-making. They will create dashboards and reports, helping the organization understand market trends, opportunities, and challenges in relation to business needs.

Key Responsibilities

- Provide ongoing product monitoring, analysis, and communication of results
- Conduct competitive product and market trend research
- Build effective relationships with key internal stakeholders (e.g., Portfolio Managers, Client Service, Compliance, Legal, Sales)
- Provide product-related support to sales teams, including internal and external client requests
- Support quarterly and semi-annual commentary process
- Effectively carry out data visualization tasks for client and business needs
- Develop implementation plans and coordinate with applicable stakeholders for large projects
- Effectively size out effort and value for intake items with team members, stakeholders, and business partners
- Prioritize and decipher requirements for ad-hoc requests and co-ordinate the execution to specifications
- Research new product opportunities and take an active role in any future product development
- Assist with completion of RFPs and DDQs, when necessary, as well as other marketing initiatives

Requirements

- Exceptional attention to detail and strong business and financial acumen
- Advanced Excel skills
- Completion of or working towards CFA or CIM designation
- Data Analysis and the ability to interpret and communicate key findings

- Proficiency with Morningstar Direct, eVestment, Refinitiv Workspace and other analytics platforms
- Ability to prioritize tasks and work well under pressure to meet tight deadlines
- A team-first individual who is naturally curious, takes initiative, has a strong work ethic and a positive attitude
- Bilingual with French and English would be considered an asset

This posting is for a current vacancy on our Marketing team. To apply, send your resume to **careers@beutelgoodman.com**.

If you require any accommodations during the recruitment process, please email us at **hr@beutelgoodman.com**. A member of our HR team will reach out to you.