

JOB OPPORTUNITY

Position: VP, Portfolio Analytics
Reporting to: Managing Director, Head of Canadian Equities
Term: Full-Time
Location: 20 Eglinton Ave West, Toronto

Overview

The Vice President of Portfolio Analytics provides high-quality analytical support to Portfolio Managers. They support business development and client retention by preparing analytics, commentary, and client-ready materials. While acting as a liaison between investment teams and distribution, marketing, and product development functions, they improve investment team efficiency by taking ownership of non-investment activities (ex. content preparation, portfolio analytics reporting, and coordination with internal business groups).

Key Responsibilities

Team Efficiency & Internal Coordination

- Manage scheduled and ad-hoc projects that enable PMs to focus on research and portfolio construction.
- Gather, package, edit, and distribute quarterly review materials for internal and external audiences.
- Establish, maintain, and organize centralized information repositories (e.g., corporate meetings, research materials).
- Support updating process documentation and participate in business continuity exercises as required.

Client Retention & Business Development Support

- Act as a key intermediary between PMs and client distribution channels.
- Respond to stock-specific, portfolio-level, and strategy-level inquiries from existing clients.
- Coordinate and review information for consultant databases, investor due-diligence requests, and RFP responses.
- Assist with production, refinement, and customization of marketing materials, white papers, and product messaging that articulate the firm's investment philosophy and process.
- Ensure consistency and accuracy of information disseminated to clients and the market.

Portfolio Analytics & Reporting

- Prepare attribution, contribution, screens, portfolio analytics, and meeting preparation materials for PMs.

- Produce monthly and quarterly performance commentaries across assigned strategies.
- Troubleshoot, manage, and update portfolio characteristics and data within Eikon or other analytics platforms, coordinate data transmission to IT.
- Handle ad-hoc analytics requests stemming from client inquiries, consultant requests, or PM needs.
- Maintain and monitor various portfolio analytics reports and contribute to the refinement and modernization of research and data repositories.
- Track and maintain “Model Change” transactions used across distribution channels.
- Prepare periodic analysis for internal committees and recurring cross-functional meetings.

Cross-Functional Collaboration

- Participate in client meetings where required.
- Collaborate with Marketing, Client Service, Business Development, Compliance, and IT on various initiatives and information flows.
- Attend firm-wide initiatives, committee meetings, and recurring business reviews as required.

Requirements

- Undergraduate degree in business or finance, with strong knowledge of investment portfolios and capital markets.
- Institutional investment or product-related experience preferred.
- CFA designation preferred.
- High proficiency in Microsoft Office (Excel with intermediate capabilities: vlookups, formulas, pivot tables, and graphs).
- Experience with investment platforms and analytics tools such as Bloomberg, Eikon, eVestment, Morningstar, and Mercer.
- Strong written and verbal communication skills, with experience producing clear client-facing and internal materials.
- Strong analytical thinking, problem-solving ability, and intellectual curiosity.
- Excellent organizational, time-management and multitasking abilities, with the ability to pivot efficiently between priorities.
- Ability to work collaboratively across teams, demonstrating leadership, initiative, and strong interpersonal skills.
- High attention to detail and consistency in materials provided to clients and internal stakeholders.

This posting is for a current vacancy on our Canadian Equities 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.