

# ZCCM-IH PLC

## JOB DESCRIPTION

### 5.8.1 IDENTIFICATION SECTION

**JOB TITLE** : **Portfolio Analyst-Non-Mining Assets**

**GRADE** : **ZH4**

**DEPARTMENT** : **Investments**

### 5.8.2 JOB PURPOSE

To analyse and review Investee and Subsidiary Companies performance in line with achieving an optimum return on investment.

### 5.8.3 KEY RESULT AREAS AND PRINCIPAL ACCOUNTABILITIES

<b>KEY RESULT AREAS</b>	<b>PRINCIPAL ACCOUNTABILITIES (MAIN DUTIES)</b>
Research	<ul style="list-style-type: none"><li>• Undertakes research to aid in the analysis of the performance of investee and subsidiary companies.</li><li>• Researching on new portfolio construction techniques and approaches</li></ul>
Financial Analysis	<ul style="list-style-type: none"><li>• Analyses financial performance in relation to the Balance sheet, profit and loss, cash flow statements against the business plan models</li><li>• Updates Portfolio Manager – Non Mining Assets on additional investment ideas;</li><li>• Keeps up to date with market developments, new investment products and other market trends.</li></ul>
Liaison	<ul style="list-style-type: none"><li>• Maintains regular communication with existing investment partners and Representative Directors.</li><li>• Liaise with the other internal departments like the risk team, finance and legal departments ensure all the investments are in line with the investment strategic goals.</li><li>•</li></ul>
Monitoring	<ul style="list-style-type: none"><li>• Monitors the financial news using specialist media sources, specifically company-specific news and key</li></ul>

	<p>economic variables affecting investee-companies being overseen.</p> <ul style="list-style-type: none"> <li>• Ensures that the Investment limit is maintained at all times.</li> <li>• Building tools for effective portfolio performance management.</li> <li>• designing investment strategies, analysing portfolio attribution and applying risk management techniques.</li> </ul>
Report	<ul style="list-style-type: none"> <li>• Writes research reports and presents investment ideas to the investments team;</li> <li>• Analyses and makes recommendations as to the performance of allocated investee companies, and where applicable, whether investments should be maintained in the investments portfolio.. <ul style="list-style-type: none"> <li>• Producing detailed quarterly reporting packs to facilitate investment team discussions to aid investment ,re-investment or disinvestments decisions.</li> <li>• Deliver portfolio management information that include performance, returns, valuation and timely reports to the Head of Section to enable preparation of monthly management and quarterly board reports to support decision making.</li> </ul> </li> </ul>

#### 5.8.4 REPORTING RELATIONSHIPS

- a) **Reports to:**  
Portfolio Manager-Non Mining
- b) **Other Jobs Reporting to (4a) above:**  
Portfolio Analyst-Non Mining Assets
- c) **Number and level of immediate subordinates:**  
two

#### 5.8.5 ESSENTIAL/DESIRABLE EXPERIENCE/QUALIFICATIONS

- a) **Professional Qualification:**  
  
Grade 12 certificate  
Bachelor's degree or professional qualification  
Professional membership
- b) **Minimum Relevant Pre-Job Experience:**  
  
3 years' experience in a similar position

**c) Skill Specifications:**

- Negotiation skills
- Communication skills
- Computer skills
- Understanding and experience in performance calculations and reporting

**d) Other Attributes (Personality Traits)**

- Persuasive
  - Pleasant
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Job Holder's Name: Job Holder's Signature:

Supervisor's Name: Supervisor's Signature:

Date of Issue: