

ZCCM-IH PLC

JOB DESCRIPTION

JOB TITLE : **CHIEF INVESTMENTS OFFICER**

JOB GRADE : **ZH2**

DIRECTORATE : **INVESTMENTS**

JOB PURPOSE:

To lead in identifying and structuring investment opportunities and operations and undertake capital and money market operations. Monitor investments in order to ensure that desired returns on investment are achieved. Make recommendations to management on appropriate refinements to make to existing investments and identify potential investments to pursue and manage risks associated with investments. Manage all investments/projects as contained in the Strategic Plan.

KEY RESULT AREAS AND PRINCIPAL ACCOUNTABILITIES

KEY RESULT AREAS	PRINCIPAL ACCOUNTABILITIES (MAIN DUTIES)
Investments' Strategy and Policy	<ul style="list-style-type: none">• Drives the Organisation's strategy on investments;• Creates new strategic and tactical investment portfolios and identifies the best execution methods for those investments;• Recommends investments, monitors the performance of the investments, ensuring ZCCM-IH's objectives are met and the strategic and financial goals achieved• Effectively communicate the investment policy and portfolio decisions;• Identify the key investment projects for the Financial Year and develops Business Plans, thereof.
Financial Analysis and Investments Research	<ul style="list-style-type: none">• Oversees the Company's Financial investment analysis in investee companies and other sectors and conducts independent research to determine their viability;• Maintains the financial analysis tool and tracks the trends on all investments;• Develops and submits financial analysis reports on each investments/ project for decision making
Portfolio and Asset Management	<ul style="list-style-type: none">• Leads in the monitoring of the performance for the investee companies; subsidiaries and other investments;• Develops framework for decisions about the portfolio management strategies used for investment purposes.

	<p>Leads process for all portfolio management decisions and implementation, including asset selection, portfolio rebalancing;</p> <ul style="list-style-type: none"> • Responsible for overseeing portfolio allocation levels under various market conditions; • Leads the construction and management process for all portfolio models, including ongoing tactical adjustments as necessary.
Relationship with Stakeholders	<ul style="list-style-type: none"> • Promotes and establishes good working relationships with stakeholders and develop alliances that add value to the Business; • Maintains good relationships in the financial sector to remain fully informed on various sources of finance; • Actively monitors the socio-economic trends in the market to regularly align the funding program as per market norms and requirements
Leadership	<ul style="list-style-type: none"> • Leads and coaches a team of highly qualified professionals in portfolio management; business development; capital and money markets; Energy; properties and agricultural based projects, to achieve annual business plan objectives; • Sets investment performance targets in accordance with the regulations and investment policies, • Leads the Management Investments Committee (MIC), • Responsible for the investments papers that go to the Investments Committee of the Board (ICB); • Leads and coordinates the Investment Team day to day activities, including allocation of time and research resources and the optimization of a team-specific budget. • Establish and monitor staff performance and development goals, assign accountabilities, set objectives, establish priorities, conduct annual performance appraisals and staff discipline
Business Development and Project Management	<ul style="list-style-type: none"> • Evaluates project proposals / investment ideas; • Conducts detailed feasibility studies for investment evaluation of the project and developing, as well as presenting investment proposals for internal approval of the Investment Committee; • Establishes and reviews due diligence policies and procedures and frequently reviews team members to ensure continued and ongoing adherence; • Ability to identify a viable project(s); • Ensures that the projects are efficiently and effectively managed according to the agreed timescale and budget; • Monitors investment performance through project progress and maintains alignment with project feasibilities.

Enterprise Risk Management	<ul style="list-style-type: none"> • Liaises with the Chief Risk and Internal Audit Officer on risk management issues that directly impact the strategic direction of the company' investments; Understands and interprets the Enterprise Risk Management tools, practices, and policies to analyse and report enterprise risks, and to manage risks according to an enterprise risk management framework;
Capital and money markets	<ul style="list-style-type: none"> • Oversees the administration of the treasury operations in respect of money and capital markets and custodial services; • Oversees management of the treasury system and the tracking all types of new capital investment proposals in terms of cost, schedule and performance; • Manages the funds placements with financial institutions; • Reviews treasury reports such as maturity ladder, liquidity mismatch, interest risk gap analysis, currency risk exposure, and concentration risk reports to enable management assess exposures to various risks in the operating sectors.
Subsidiary Oversight	<ul style="list-style-type: none"> • Monitor subsidiary businesses to ensure that they efficiently and effectively provide needed products and services while staying within budgetary limits, investment performance targets and operational goals.
Resource Mobilisation	<ul style="list-style-type: none"> • Effectively mobilises human, financial, technical and material resources to enhance effective implementation of all investment projects in ZCCM-IH.

REPORTING RELATIONSHIPS

- a) **Reports to:**
Chief Executive Officer
- b) **Other Jobs Reporting to (a) above:**
Chief Financial Officer
Chief Technical Officer
General Counsel
Chief Corporate Services Officer/Company Secretary
Chief Risk & Internal Audit Officer
Human Resources Manager
Public Relations Manager
Procurement Manager
- c) **Number and level of immediate subordinates:**
Business Development Manager
Capital & Money Markets Manager
Portfolio Manager

Property Manager
Office Manager

ESSENTIAL/DESIRABLE EXPERIENCE/QUALIFICATIONS

a) Professional Qualification:

- Grade 12 Certificate
- Bachelor's Degree in Business Administration; Finance; Accountancy or related field
- Professional qualification: CFA; ACCA or CIMA
- Masters' Degree in Investment Management; Financial Management or MBA
- CFA designation highly preferred.

b) Minimum Relevant Pre-Job Experience:

10 years' experience at senior management level in investments or financial markets.

c) Skill Specifications:

- Communication and interpersonal skills
- Leadership skills
- Project management skills

d) Other Attributes (Personality Traits)

- Integrity
- Conscientious
- Creative



ZCCM Investments Holding Plc
Incorporated in the Republic of Zambia

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