



Copia Associate – Portfolio Management

Department: Copia Capital Management
Reports to: Copia Senior Portfolio Manager
Main Location: Copia Capital Office, London – Primarily office based

About Novia

Novia Financial is an award-winning financial technology company based in the heart of Bath, just a 5-minute walk from the train and bus stations. We launched to market in October 2008 to provide a comprehensive wealth management service or 'full wrap platform' for Financial Advisers and their clients. Novia provides a transparent pricing structure as well as access to a wide range of product wrappers, an all-encompassing suite of portfolio management tools, and access to an extensive range of investments. For more information about us, please visit <https://www.novia-financial.co.uk/>

Copia Capital Management provides a Discretionary Fund Management service available via both the Novia Financial platform and other wrap platforms for custody and administration in the UK, and via the Novia Global platform internationally. Set up by Novia Financial in 2013 as a trading style, Copia offers a range of portfolios with different objectives to address different client needs. The core investment approach uses proprietary quantitative algorithms as an asset allocation and risk management tool.

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Job Summary/Purpose

The role holder will be responsible for assisting Portfolio Managers in designing and managing investment portfolios/funds for intermediated retail clients, including strategic asset allocation, tactical asset allocation and fund selection, utilising both qualitative and quantitative analysis (as appropriate and where specified), to create a structured investment process within specified risk-return parameters.

They will also support sales and marketing activity through the provision of effective research, insight and content relating to Copia managed portfolios/funds in specific, and capital market/the economy in general.

Specialist Skills, Qualifications and Experience

Essential:

- > Degree or equivalent in Finance.
- > One plus years' investment management experience.
- > Strong analytical skills.
- > Attention to detail.
- > Outstanding communication skills, both written and verbal.

Desirable:

- > CFA charter holder or a Master's degree in Quantitative Finance.
- > Model portfolio management experience at a Discretionary Fund Manager.
- > Good understanding of retail platforms.
- > In-depth knowledge of ETFs.
- > Use of statistical software packages like MATLAB.
- > Proficient with Bloomberg.

Key Contacts:

- > Executive and Senior Management teams.
- > Third party service providers.
- > Sales Teams.
- > Marketing Team.
- > Risk and Compliance Teams.
- > Legal Counsel.

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Key Responsibilities:

- > Strictly adhere to processes and controls in place for managing portfolios.
- > Produce regular investment information such as portfolio/fund performance, risk and holdings analysis via, for example, monthly factsheets and quarterly investment reviews.
- > Create and maintain pitch documents as well as Investment Committee reports.
- > Prepare customised investment analysis to support the Portfolio Managers in communicating their views.
- > Ensure that the appropriate document version control is in place and maintained at all times.
- > Support the development of sales and marketing materials to support the sales team and related marketing campaigns.
- > Work with the Sales Teams to provide investment research/analysis and respond to any queries.
- > Achieve and actively maintain your skills and knowledge to adhere to the Training and Competence standards, including continuous professional development.

Assist Portfolio Managers in:

- > Conducting due diligence and research on funds currently used, as well as potential funds that could be used in Copia portfolios.
- > Creating articles on relevant investment topics for various social media outlets.
- > Building custom decision support tools to disseminate portfolio ideas to the broader business' product and portfolio teams.
- > Developing effective tools and techniques as part of the Copia Toolkit for managing portfolios/funds as per their respective Investment Processes.
- > Reviewing existing practices and processes and suggest improvements.

You will, from time to time, be required to undertake other activities that fall within your capabilities as directed by management.

Core Competencies:

Business Focus - The motivation and ability to apply good financial practice and company procedures at all times.

Operational Excellence - Continually delivering and improving excellence for clients and customers.

Client and Customer Focus - Add value to client/customer, adhere to Treating Customers Fairly principles, and operate as a true business partner.

Communication - Communicate clearly and concisely, tailoring content and style, with ability to make a positive impression on others.

Expert Knowledge - Consistent application of professional or specialist knowledge and skills; takes opportunities to contribute to policy and best practice.

Working with Others - Working successfully with others and building a network of good relationships to achieve shared goals.

Performance Focus - Demonstrate energy and enthusiasm, takes ownership, delivers results and improves personal performance.

Working at Novia Financial

Some of the benefits of working at Novia Financial:

- > Competitive salary.
- > Annual discretionary bonus scheme.
- > Flexible working requests considered.
- > 25 days holiday entitlement plus bank holidays, with the option to purchase or sell up to 5 additional days per year.
- > Tech Scheme (buy discounted electrical products and pay back monthly via Company payroll).
- > Cycle to Work scheme.
- > Supported and encouraged professional development.
- > Regular social events.
- > Flexible dress code in the office.
- > Private medical scheme.
- > Income protection scheme.
- > Group contributory pension scheme.
- > Internal mentoring scheme.
- > Employee Assistance Programme (EAP).
- > Interest free season ticket loans for travel costs.

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- > Various corporate gym membership rates.
- > Novia Foundation Day in support of charitable activities.

To apply for this role, please email an up-to-date CV to jobs@novia-financial.co.uk