

# Role Profile: Senior Analyst or Associate, Co-Investment

<b>Functional Title:</b> Senior Analyst or Associate, Co-Investment	<b>Rank:</b> Senior Analyst or Associate
<b>Department:</b> Private Equity, Co-Investment	<b>Reporting to:</b> Andriy Fitsych
<b>Location:</b> New York	<b>Employment Type:</b> Permanent
<b>About Capital Dynamics:</b>	
<p>Capital Dynamics is an independent global asset management firm focusing on private assets, including private equity (primaries, secondaries co-investments), private credit, and clean energy infrastructure. Created in 1988, the Firm has extensive knowledge and experience developing solutions tailored to meet the exacting needs of a diverse and global client base of institutional and private wealth investors. As of Q1 2021, Capital Dynamics oversees more than USD 15 billion in assets under management and advisement and employs approximately 160 professionals globally across 14 offices in Europe, the Middle East, North America, and Asia. Capital Dynamics is a recognized industry leader in responsible investing, receiving the highest marks from the UNPRI for its Strategy &amp; Corporate Governance, and investment strategies. For more information, please visit: <a href="http://www.capdyn.com">www.capdyn.com</a></p>	
<b>Department Overview:</b>	
<p><b>Private Equity Co-investment:</b> Global co-investment typically makes investments in mid-market companies alongside established lead investors and specialist sponsors who have a history of strong performance, relevant sector expertise, consistent strategy and execution, and whose teams have shown that they can invest successfully through different economic cycles. The co-investment team invests in companies in North America, Europe, and the rest of the world, particularly developed Asia. Companies sought have sustainable competitive positions, strong growth opportunities and high ESG standards. While sector agnostic, preferred industries include consumer, healthcare, technology and business services and, to some extent, industrial companies and those in the energy and power markets.</p>	
<b>Role Purpose:</b>	
<p>Capital Dynamics is seeking a Senior Analyst or Associate to assist members of the co-investment team in the analysis, due diligence and monitoring of direct investments, as well as periodic valuation and reporting.</p>	
<b>Tasks and Responsibilities:</b>	
<p>To succeed in this role, you will:</p> <ul style="list-style-type: none"> <li>• Participate in direct investment selection, fund portfolio management and reporting.</li> <li>• Undertake due diligence on prospective investments including financial statement analysis, sensitivity testing, market assessments and preparation of co-investment memoranda for investment committee review and consideration.</li> <li>• Work in conjunction with primaries team to develop relationships with financial sponsors in order to help source investment opportunities</li> <li>• Review transaction documentation; prepare closing certificates, valuation analyses and the periodic reports (commentary and numerical data) used to communicate with fund investors.</li> <li>• Support fundraising efforts including preparation of marketing documents and communication with investors</li> <li>• Complete one-off projects as they may arise from time-to-time.</li> </ul>	

**This description is for guidance purposes only. You may be required to fulfil additional roles and perform additional duties as required from time to time.**

#### **Skills, Experience, Education & Qualifications:**

To succeed in this role, you should have:

- A Bachelor's degree from top-tier institution
- Two to four years' relevant experience in private equity, investment banking or a closely-related field
- Highly developed quantitative skills, strong financial modeling and writing skills (financial analysis, modeling, valuation and reporting)
- Exceptional attention to detail with ability to produce a high quality work product
- Project management and presentation skills combined multi-tasking abilities
- Highly developed verbal/written communication skills (articulate, balanced and persuasive)
- An understanding of the legal framework and documentation typical of a direct investment
- Sound investment judgment with a keen awareness of risk, return and exposure management

#### **Competencies:**

You will be...

- Intellectually curious, proactive and self-motivated
- A great, agile communicator both written and verbally, with the ability to be articulate, balanced and persuasive
- Commercially minded
- Able to complete tasks quickly and efficiently, having regard to changing priorities, differing time zones and geographies

#### **Diversity and Inclusion:**

Capital Dynamics is an Equal Opportunity Employer, and is committed to creating a global diverse workforce. We are a global company with 24 nationalities represented across our staff in 13 offices, spanning North America, Europe, the Middle East and Asia. We believe diversity and inclusion ("D&I") is key to being better at what we do and our initiatives are designed to attract, develop, and advance talented individuals, regardless of race, sexual orientation, religion, age, gender, disability status or any other dimension of diversity. We welcome and strongly encourage suitably qualified applicants from a wide range of backgrounds to apply to join Capital Dynamics.