APPENDIX ONE:
Position Description

POSITION TITLE:	Associate Research Analyst
LOCATION:	Auckland
PEOPLE LEADER:	Head of Institutional Equities Research
TEAM:	Institutional Equities Research

At Craigs (CIP) we are focused on helping our clients to achieve their financial goals and grow their wealth. We believe that where a client's financial future is concerned, our people are fundamental to achieving this. Our collective skills, knowledge and commitment means that we can provide the best possible outcomes for our clients.

The main purpose of this role is to ensure the delivery of high quality research on NZ's leading listed companies to institutional clients of Craigs Investment Partners. The Associate Research Analyst will primarily support the Head of Research as well as contribute to the overall performance of the research team.

WHAT I DO

- Support the Head of Research to produce research reports, flagship equity strategy product, and respond to client requests. This includes, but is not limited to:
    - Collect relevant data from third parties such as Statistics NZ, RBNZ, Bloomberg, Refinitiv, screen scraping services and other sources to create charts and tables for publication;
    - Preparation of PowerPoint presentations;
    - Update and maintain internal databases, particularly for our Equity Strategy product;
    - Support the maintenance of financial models (typically excel) including company valuation models.
    - Writing research notes or sections of research notes.
- Meet with covered company management teams and industry contacts.
- Keep up to date with current events particularly those that impact companies researched by Craigs.
- Respond to client requests for service.
- Ensure compliance standards and Chinese walls policies are adhered to.
- Tasks must be done in a timely manner (that is, for the most part, immediately).

CONTINUOUS LEARNING

Focus areas for this role include:

- Database management (mainly excel).
- Leveraging existing and emerging AI-based technology to improve efficiency.
- Maintain current knowledge of markets, research, applicable NZX Rules and Government Legislation.

- Remain current with CIP training obligations, including policies and procedures.
- Associates are encouraged to read widely.

GENERAL DUTIES AND RESPONSIBILITIES

- Operate within the parameters of the NZX rules and regulations, relevant legislation and CIP procedures and policies.
- Maintain a high level of competence with Craigs Investment Partners' systems.
- Follow company policy and process to ensure client information is protected against loss, unauthorised access, use, modification of disclosure.
- Maintain the core competencies as set down by the Company from time to time.
- Complete all Company educational requirements as required for the role as set by the Company.
- Act professionally, ethically and work co-operatively and constructively within the framework of the Company structure.
- At all times act with integrity and treat clients fairly and respectfully.
- Demonstrate the Craigs' values every day.

NZX RULES REFERENCED WITH LEGISLATION AND POLICY

The NZX Participant Rules can be found electronically at the following address -

https://www.nzx.com/regulation/nzx-rules-guidance/participant-guidance

CIP policies can be found on the Staff Intranet.

WHAT I VALUE

At Craigs, we pride ourselves on creating an environment where our people feel they belong and can bring their best self to work and feel valued. We grow as a team and with our clients and are always looking to support our communities – both internal and external. Our values build the foundation of how we work and how we provide great outcomes for our people and our clients.

WHAT I BRING

- Qualification
  - Undergraduate degree in Accounting, Finance or Statistics.
  - Postgraduate Degree (Accounting & Finance or Statistics favored) or CA/CFA (desirable)
- Knowledge
  - Strong financial modelling (excel).
  - Broad knowledge of Australasian Equities market and current events.
  - Knowledge of valuation techniques and accounting terms and definitions (e.g. balance sheet items etc).
  - Ability to navigate data sources such as Bloomberg and Refinitiv.
  - Programming skills (for example: VBA, R) that could be used to help procure additional data and insights on covered companies (desirable).
  - SQL database management (desirable).
- Experience
  - One to three years direct experience in investment banking, equity analysis, corporate finance or accounting with a leading employer in their respective field.
  - Proven company analysis skills (desirable)
  - Strong market reputation
- Skills and Attributes
  - Outstanding written and verbal communication skills (English).
  - Numerate.
  - Interest in investing and the stockmarket.
  - Excellent spreadsheet skills – Excel, Word, datastream, PowerPoint.
  - Keen attention to detail.
  - Able to work effectively in an intense work environment.
  - Outstanding written and verbal communication skills.
  - Proactively seeks new ways to source information.