Junior Investment Analyst

Fund operations, client reporting and external manager selection

Corestone Investment Managers AG | Zug | 80 to 100% | Start: January 2027 or by agreement

> **The role in brief.** You support the portfolios we run and the clients we act for, from trading and operations to client reporting and manager research. You work directly with the partners and see the whole investment process, from trade to report.

1. About Corestone

Corestone Investment Managers AG is an independent, partner-owned investment firm in Zug, founded in 2007. We act as outsourced chief investment officer for family offices and private clients and run our liquid, risk-balanced multi-asset strategy through our own fund as well as managed and segregated accounts.

We are looking to add an analyst to the team.

2. What you will do

Fund operations and trading

- Prepare, check and record trades for the fund in liquid instruments (futures, ETFs, FX) with the portfolio manager
- Reconcile positions, cash and collateral with brokers, the fund administrator and the depositary; follow up breaks
- Act as day-to-day contact for the fund administrator and management company; keep the incident and service logs

Client reporting

- Produce the monthly fund factsheet and support the quarterly investor letter
- Build consolidated reports for mandate clients across several banks and managers
- Prepare material for clients' investment committee meetings and keep the underlying data clean and documented

Manager research and selection

- Screen managers and funds across asset classes, including private markets and hedge fund platforms

- Run requests for proposal and due diligence questionnaires; compare terms, fees and track records
- Take part in manager meetings, write up notes and monitor selected managers against agreed guidelines
- Support custodian and service provider searches

3. What you bring

- A university degree in finance, economics, mathematics, engineering or a similar field
- Up to three years of experience, for example in asset management, a bank, a fund administrator or a family office; strong internships count
- Very good Excel skills; Python, SQL and Bloomberg experience are an advantage
- A precise, reliable way of working: you check numbers before they leave the building
- Interest in markets, portfolio construction and risk, and the willingness to do operational work properly
- Fluent English, written and spoken; German is an advantage, a further European language is welcome
- CFA programme (level I passed or in progress) is a plus
- Right to work in Switzerland

4. What we offer

- **Breadth.** Operations, reporting and investment research in one role.
- **Direct contact.** You work with the partners every day and meet clients, managers and banks early on.
- **Development.** We pay for the CFA programme or a similar qualification, and you take on more responsibility as you grow into the role.
- **A focused team in Zug.** Short decision paths, with your workplace in our Zug office.

5. How to apply

Please send your CV, a short cover letter and your recent work references to hr@corestone.ch. Questions about the role are welcome at the same address.

We look forward to hearing from you.