

**CITY OF BRADFORD METROPOLITAN DISTRICT COUNCIL
JOB PROFILE**

DEPARTMENT: Chief Executive	SERVICE GROUP: WYPF
POST TITLE: Investment Analyst – Property	REPORTS TO: Investment Manager – Property and direct Private Markets
GRADE: PO6	SAP POSITION NUMBER :

The following information is furnished to help Council staff and those people considering joining the City of Bradford Metropolitan District Council to understand and appreciate the general work content of their post and the role they are to play in the organisation. The duties and responsibilities highlighted in this Job Profile are indicative and may vary over time. Post holders are expected to undertake other duties and responsibilities relevant to the nature, level and scope of the post and the grade has been established on this basis. For posts where employees speak directly to members of the Public the post holder is required to demonstrate their ability to speak fluently in English.

As a candidate you will be expected to demonstrate your ability to meet the special knowledge, experience and qualifications required for the role by providing evidence in the application form for the purpose of shortlisting. Applicants with disabilities are only required to meet the essential special knowledge requirements shown by a cross in the end column of this section.

The employee competencies are the minimum standard of behaviour expected by the Council of all its employees and the management competencies outlined are those relevant for a post operating at this level within our organisation.

Both sets of competencies will be used at interview stage and will not be used for short listing purposes.

Key Purpose of Post: Max 3
To assist the Managing Director, Chief Investment Officer, Assistant Directors, Investment Managers and Deputy Investment Managers, in the provision of a high quality investment management service.
To lead on providing analysis and support to senior investment managers in the discretionary management of the West Yorkshire Pension Fund's investment portfolio, with particular emphasis on Property.
Main Responsibilities of Post: Max 15
<ol style="list-style-type: none"> 1. To provide independent and objective analysis and advice to senior managers to support the discretionary management of the West Yorkshire Pension Fund's property portfolio, currently valued at over £750 million, with a plan to increase this to £1bn over the medium term. 2. Within the approved strategy of the Fund the post holder will lead on providing

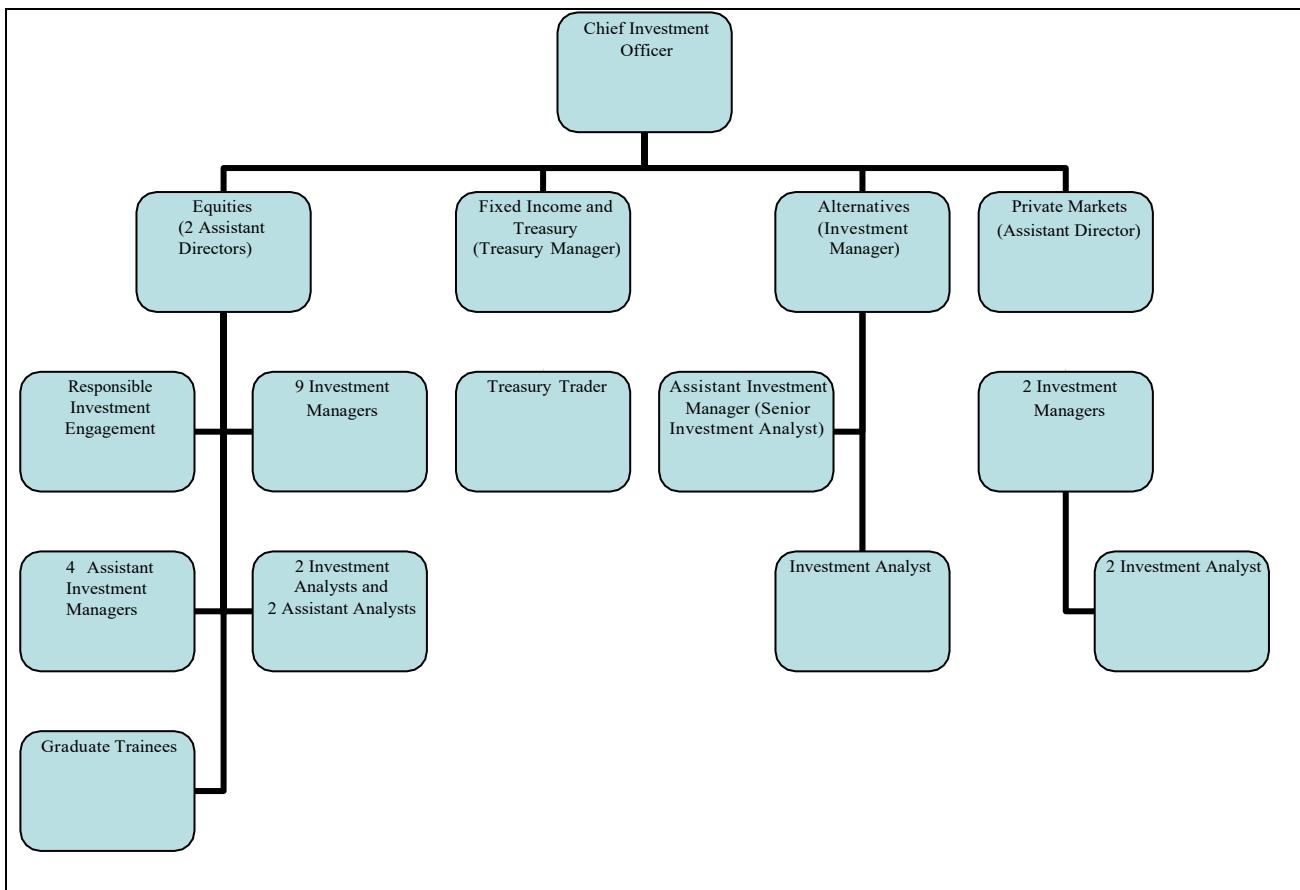
independent investment advice and analysis to senior investment managers. The post holder will proactively conduct due diligence and evaluate property opportunities.

Associated responsibilities include:

- Evaluating external investment management firms, fund strategies, market position and competitive environment, track records, team dynamics, alignment of interest, and fund economics.
- Origination and benchmarking of fund track records.
- Building portfolio-level cashflow models.
- Portfolio monitoring.
- Contributing to new investment proposals through data room research and third-party referencing and validation.
- Liaising with legal and finance teams during all phases of the investment process.

3. Meeting with fund managers, agents, main board directors, etc. This may include travel for related site visits and conferences.
4. Maintain up to date research and information on any external funds used.
5. Undertake risk management and flag potential portfolio construction limit breaches.
6. Undertake performance analysis exercises in order to ascertain positive and negative return attribution compared to the market indices.
7. Contribute to the quarterly strategy and asset allocation meetings with the Fund's external investment advisers.
8. Assist in the preparation of reports for presentation to the Fund's Investment Advisory Panel, which includes elected members from all five West Yorkshire District Councils, and to attend and present reports when required.
9. To help supervise, train and develop the Assistant Analysts and Graduate Trainees.
10. To support in covering the work of other colleagues and senior investment managers in their absence.
11. Assist in meeting the investment return targets set for portfolios by the Chief Investment Officer and the Investment Advisory Panel.
12. To assist in the development and maintenance of investment, performance, accounting and control systems.
13. The post holder is expected to undertake other duties and responsibilities relevant to the nature, level and scope of the post and the grade has been awarded on this basis.

Structure:



Special Knowledge Requirement: Essential for shortlisting. Max 10

Applicants with disabilities are only required to meet the essential special knowledge requirements shown by a cross in the end column

	Essential
English language requirements for public sector workers, in customer facing roles, came into force in November 2016. The post holder is required to demonstrate that they are sufficiently fluent in English for the effective performance of their role. The applicant will be required to demonstrate, during the interview process, that they can express themselves fluently and spontaneously and for this role the post holder should have the ability to explain difficult concepts clearly and concisely.	X
Carries out the working practices, procedures and basic operations across a specialist area or number of specialist areas	X
Uses knowledge, safety and environmental policies , procedures and regulations, including risk in own area and/or other areas of work. (including legislation)	X
Uses a range of specialist ICT systems across own work area and or across other areas of work.	X
Uses, interprets, analyses, communicates complex numerical Information	X
Understands operational Investment Management.	X
Able to understand and analyse complex financial data in an investment context.	X

Understands and is able to relate the impact of economic data on financial markets.	X
Understands the methods of investing in property alongside asset management and valuation techniques.	X
Able to write and present investment reports to ensure key information is provided to Members.	X

Relevant experience requirement: Essential for shortlisting

The applicant is required to provide evidence of having previously spoken fluently to members of the public, clients or councillors, in order to meet the Advanced threshold level outlined under Special Knowledge above.

Organising and planning own workload in a busy professional environment with many competing tasks.

Relevant property investment management experience

Experience of working within the professional area of a large financial organisation

Relevant professional qualifications requirement: Essential for shortlisting

RICS, CFA, or CAIA qualified, or other recognised relevant qualification

OR

Educated to degree level, with significant and demonstrable investment management experience in real estate.

Core Employee competencies at manager level to be used at the interview stage.

Carries Out Performance Management – covers the employees capacity to manage their workload and carry out a number of specific tasks accurately to a high standard.

Communicates Effectively - covers a range of spoken and written communication skills required as a regular feature of the job. It includes exchanging information/building relationships, giving advice and guidance, counselling, negotiating and persuading and handling private, confidential and sensitive information.

Carries Out Effective Decision Making - covers a range of thinking skills required for taking initiative and independent actions within the scope of the job. It includes planning and organising, self effectiveness and any requirements to quality check work.

Undertakes Structured Problem Solving Activity - covers a range of analytical skills required for gathering, collating and analysing the facts needed to solve problems. It includes creative and critical thinking, developing practical solutions, applying problem solving strategies and managing interpersonal relationships.

Operates with Dignity and Respect - covers treating everyone with respect and dignity, maintains impartiality/fairness with all people, is aware of the barriers people face.

Management Competencies: to be used at the interview stage.		
Operates with Strategic Awareness Our managers work with corporate priorities and policies in a joined up way with others, internally and externally. Works democratically, transparently and accountably.		
Practices Appropriate Leadership Our managers motivate their staff to exceed expectations through raising their awareness of goals and moving them beyond self-interest for the sake of the team or service. They consider serving the District in all that they do.		
Delivering Successful Performance Our managers monitor performance of services, teams & individuals against targets & celebrate great performance. They promote the District's vision & work to achieve Council's values & agreed outcomes.		
Applying Project and Programme Management Our manager's work to ensure that outcomes and objectives are achieved within desired timescales, make best use of resources and take a positive approach to contingency planning.		
Developing High Performing People and Teams Our managers coach individuals and teams to achieve their potential and take responsibility for continuous improvement. They champion the Council's values and goals.		
Working Conditions:		
The post holder must be able to work evenings, weekends and Bank Holidays as required by the needs of the service. Must be able to perform all duties and tasks with reasonable adjustment, where appropriate, in accordance with the Equality Act 2010 in relation to Disability Provisions.		
Special Conditions:		
A DBS check will be carried out as part of the recruitment process.		
Compiled by: Geoff Hepburn Date: 29 Jan 2026	Grade Assessment Date:	Post Grade: