

POSITION STATEMENT

Title:	Analyst, Direct Investments	Position no:	3017
Level:	IBA Level 4 (\$85,980 - \$91,171)	Last updated:	February 2024
Location:	Sydney	Term:	Ongoing
Program:	Investment & Asset Management		
Section:	Direct Investments		
Context:	<p>Indigenous Business Australia, partners and invests with Aboriginal and Torres Strait Islander people who want to own their future. We go further than provide money; we invest in people, places and ideas that are ready. We help make them real. We're deeply invested in the financial success and economic independence of Indigenous Australians. It's why we exist.</p> <p>We provide a range of services for Indigenous Australians to create wealth and accumulate assets, take up investment opportunities, create business enterprises that provide additional employment opportunities, and to purchase homes. We achieve these outcomes by applying a commercial focus, and by building mutually respectful and productive partnerships with Indigenous Australians, government, non-government and private sector organisations.</p> <p>Our staff are invested, informed, responsive, respectful and connected.</p> <p>Investment & Asset Management:</p> <p>IBA's Investments aims to create economic independence for Aboriginal and Torres Strait Islander peoples by using its capital base, skills and expertise, to build and manage a substantial portfolio of investments and generate economic impact for Indigenous Australians via financial returns, commercial capability development, employment, training and supply chain outcomes.</p> <p>IBA has a long history of over 20 years of successful investment alongside Indigenous organisations. The portfolio comprises over \$480 million in investments across Australia in a variety of sectors, including tourism, property, funds management, energy, primary industries, industrial and retail businesses.</p>		
Role:	<p>Primary responsibilities are:</p> <ul style="list-style-type: none">• To ensure that Investment and Asset Management is effectively supported through the provision of program strategy, policy and procedures development, budgeting and operational planning; business administration; portfolio and investment reporting and strategic and operational support.• To support the Investment Managers in execution and management of investments – including the preparation of financial models, undertaking due diligence, assisting with approvals etc.		

Duties:

Duties include, but are not limited to:

Business Analysis and Reporting

Assist the Investments team, under the supervision and guidance of the Senior Analyst, Direct Investments, with:

- Preparing reports and conducting analysis to effectively communicate the investment portfolio performance to key stakeholders.
- Financial modelling and scenario analysis.
- Delivering standardised reporting to internal and external stakeholders in order to manage investee company performance.
- Liaise with IBA's Finance Team to aligning IBA reporting requirements and other needs including reconciliation to IBA financial reporting systems.
- Managing the business administration functions of the Investments team including planning, budgeting, tracking and reporting on variances between actual and budgeted figures.
- Facilitating the development and continuous improvement of the business through providing specialist advice in relation to business processes, systems, management accounting and portfolio and investment level reporting.
- Undertaking external stakeholder engagement, including preparation of relevant correspondence for the Parliamentary Questions and Ministerial representations, briefing reports and preparation of papers for the Board, Executive and senior management, and internal and statutory reporting compliance.
- Contributing to the prudent risk management of investments to ensure that financial and reputation risks to IBA are managed appropriately, including by participating in IBA portfolio review processes.
- Driving and implementing continuous improvement across investment valuations, portfolio monitoring and impact measurement and reporting.
- Managing the annual valuation process for IBA's investments.
- Working with the Senior Analyst and other team members to update / improve the intranet site for Direct Investments.
- Other duties as required.

Investment Related

- Undertaking market and terrain research and analysis.
- Thorough, accurate and timely financial analysis.
- Assisting in:
 - development of portfolio strategy;
 - building best practice financial models;
 - undertaking investment evaluations based on the IBA's criteria;
 - sourcing and identification of potential investment opportunities;
 - performing detailed due diligence;
 - formulating and executing of investment strategy – including exit, turnaround / restructuring and growth strategies;
 - estimating potential investment equity returns, employment and procurement impacts;
 - preparing and presenting high-quality papers / presentations;
 - overseeing preparation and review of legal documentation;
 - deal structuring and execution; and
 - integration of new investments into the portfolio.

- Assist Investment Managers with the ongoing management of investments including:
 - Monitoring, managing and reporting performance.
 - Responding to information requests.
 - Managing divestments and dividend distributions.
- Assist in driving and implementing continuous improvement.
- Other duties as required.

Required capabilities

These are essential unless otherwise indicated.

Knowledge and experience

- Relevant tertiary qualifications in economics, commerce, business, accounting, actuarial studies is essential.
- Advanced use of Excel and other Microsoft products.
- Awareness of accounting and commercial matters as relevant to the role.
- Awareness of the economic development aspirations of, and commitment to working ethically with and in the interests of Aboriginal and Torres Strait Islander peoples.
- An understanding of the disciplines underpinning investment, including in relation to financial/portfolio management, risk management, impact creation and financial & impact reporting.

Skills and attributes

- Strong analytical and lateral-thinking skills.
- Self-starting and results oriented.
- Well-developed organising, planning and prioritisation skills.
- A high level of attention to detail and diligence, supported by a strong work ethic.
- Possesses the energy, commitment and diligence to meet deadlines and/or to manage the expectations of others.
- Cultural capability including a respect for diversity and ability to communicate sensitively with Aboriginal and Torres Strait Islanders.
- Strong oral and written communication skills. Ability to write professionally, concisely and with clarity.

Reference documentation: www.iba.gov.au

- About Us – Our Values
- About Us – Working at IBA
- About Us – News and Publications – Annual Reports

Further enquiries: email: askhr@iba.gov.au

Applications: email to iba_recruitment@iba.gov.au or
mail to: IBA Recruitment, PO Box 650, Fyshwick ACT 2609

- Application Coversheet
- Resume
- Statement of claims addressing the requirement capabilities

Please note that applications not accompanied by the Application Coversheet available from our website or sent directly to the enquiry officer will not be accepted.

Closing date: 20 March 2024