

Metis Global Partners
Beta Portfolio Manager
Position Profile

METIS GLOBAL PARTNERS

Metis Global Partners, LLC is a diverse/woman-owned and led institutional global equity manager founded in 2013 and based in San Diego, California. The firm's active value-oriented Global, International and Emerging Market systematic strategies have enjoyed recently renewed interest in Value investing. In addition, response to Metis' Beta capabilities launch in 2021 has been very positive, with inflows to date exceeding \$1 billion over the last year and 25+ new institutional Beta clients. In 2022, Metis plans to launch its Guided Beta™ strategies to provide clients with customized Beta solutions including Climate Aligned and ESG Beta strategies.

Metis is experiencing dynamic growth and maintains an entrepreneurial culture with opportunity for team members to make significant contributions and grow with the firm. Working at Metis, you'll be empowered to contribute meaningfully to a rapidly growing company. You'll be involved in the long-term evolution of the firm, helping to build the Metis of the future. And you'll be able to serve an agent of change in the industry, supporting the growth of Diversity and Inclusion through a diverse/woman-owned organization.

Cognitive diversity and intellectual curiosity are guiding lights at Metis, allowing the firm to embrace and harness unique perspectives into the management and day-to-day operations of the firm. This, combined with a flat organizational structure, allows contribution of opinion and thought to flow freely.

POSITION SUMMARY

The Beta Portfolio Manager will be an integral part of the investment team at Metis. This is an upwardly mobile opportunity for an investment professional who wants to be a contributor to the expanding beta management process and grow with the organization.

Responsibilities

- Carry out day to day management of equity beta portfolios. This includes but is not limited to the following: Monitoring performance, tracking error and risk of the various beta mandates using optimization, sampling and stratification methods.
- Manage and implement investment strategies on index, market or stock related events that may impact the portfolio.
- Address periodic portfolio transitions driven by index rebalances and fund flows.
- Develop and execute cash equitisation strategies to address corporate action events and client flows.
- Contribute to the beta platform development and refinement of the beta investment process.
- Work with senior team members in new beta product development initiatives.
- Communicate ongoing status of beta portfolios to senior management, clients and prospects. Ability to act as product specialist for customized beta strategies.
- Participate in client/prospect/consultant sales and/or review meetings as necessary.
- Opportunities for speaking and research engagements representing the firm.

QUALIFICATIONS

Candidates should have at least 5 years of experience working in beta portfolio analysis or management and a minimum of 2 years' experience in Global Equity markets preferably or in transition management. A Bachelor's degree is required. MBA, Finance/Quantitative related Master's degree, or CFA a plus.

Additional Qualifications

- Experience in the following:
 - Equity risk models and application in optimization, sampling, stratification, etc.
- Knowledge in Qontigo/Axioma, Barra, and Clarifi a plus.
- Fluency in a programming languages such as R, Python, SQL or Java, with demonstrated ability to manipulate and analyze large data sets a plus.
- Good knowledge of and ability to apply statistical measures and analysis.

400 Corporate Pointe Suite 300 Culver City, California 90230

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- Experience conducting empirical research spanning areas such as global markets, indices, factors and execution research.
- Strong team player with the ability to work independently.
- Good interpersonal and communication skills, with ability to articulate ideas and thought processes to various stakeholders in other teams (e.g. traders and portfolio managers).
- Ability to represent portfolios and provide consultative relationship work with clients.

COMPENSATION

Our client is prepared to offer a very attractive compensation package, including a competitive base salary as well as health, 401(k), sabbatical and vacation benefits.

Equal Employment Opportunity Policy

Our client provides equal employment opportunities (EEO) to all employees and applicants for employment and prohibits discrimination and harassment based on race, color, religion, gender, gender identity, national origin, sexual orientation, age, disability, or veteran status.

CONTACT

The Lawrence Advisory has been engaged by the client to help in this confidential search. The search is being led by:

Tracy L. Lawrence
Founder & CEO

tracy@thelawrenceadvisory.com

Steve Foster
Principal

steve@thelawrenceadvisory.com

Please submit letters of interest and resumes to:

Tiffany Scott
Director of Candidate Development
tiffany@thelawrenceadvisory.com

ABOUT THE LAWRENCE ADVISORY

The Lawrence Advisory is a human-capital consulting firm that offers Executive Search, Organizational Development and Leadership Coaching. We specialize in servicing innovative organizations with distinct cultures. For more information, refer to our website at <http://www.thelawrenceadvisory.com>.