

INVESTMENT ANALYST, KAITĀTARI HAUMI



REPORTS TO	LOCATION	DIRECT REPORTS	GROUP
Investment Director – Solutions Ringatohu Haumi - Whai Tikanga	Various	Nil	Investment

“Our purpose is to grow companies internationally – bigger, better, faster – for the good of New Zealand”

“Tā mātau whai kia whakakaha kamupene – kia nui ake, kia pai ake, kia tere ake – mō Aotearoa ngā whiwhinga”

WHY IS THIS ROLE IMPORTANT? | TE MANA Ō TE MAHI?

The purpose of this position is to support the wider NZTE Investment team’s activities through deal team engagement, research, and analysis.

WHAT’S THE ROLE ABOUT | TE NGAKO Ō TE MAHI?

The most important work of this role is to...

- Supporting NZ companies and greenfield projects to raise capital for the benefit of New Zealand.
- Support with the preparation of deals and projects through, research and analysis, financial modelling, investor profiling, valuation support, competitor analysis, transaction mechanics, and investment collateral required by the Investment Director - Solutions and other key members of the investment team.
- Provide data, research, and strategic support the Investment team.
- Manage the collection, manipulation, and analysis of qualitative and quantitative data.
- Produce thorough and well-organised reports, presentations, and graphics to summarise and explain research findings and their implications. Including sector insights and analysis.
- Ensuring client-facing collateral is promoted and leveraged across the team and utilised effectively internally and externally from NZTE.
- Work closely with domestic and international Investment Managers to deliver on deal and project requirements.
- Support Investment Managers and Investment Directors in delivering presentations and/or data direct to customers as and when required.
- Interact and communicate with customers as required to gather info and report findings.

Success in this role means:

- Research and analytics – Ensuring accuracy in all information analysed, commerciality of findings, modelling and innovation in methodology.
- Collateral and Reports – The creation and curation of Investment collateral and the production of quality reports.

INVESTMENT ANALYST, KAITĀTARI HAUMI



- Outstanding delivery – You bring value to NZTE’s Customers and the Investment team by providing a world-class service.

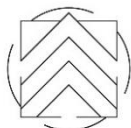
WHAT CAPABILITIES ARE NEEDED TO SUCCEED | Ō PŪKENGA?

- Strong analytical and interpersonal skills, with a commitment to professional and customer service excellence.
- A proactive working style and be a self-starter with the ability to deliver to deadlines.
- Strong communication skills, including technical writing skills and an ability to present findings in a clear manner.
- Proficiency in the use of the suite of MS Office software, including PowerPoint and functional skills in Microsoft CRM.
- Advanced spreadsheet and data manipulation skills.
- Strong financial modelling skills.
- A collaborative approach with colleagues.
- Tertiary qualifications in finance, accounting, economics, mathematics, or business.
- Study towards your CFA, CA or other professional qualification is advantageous.

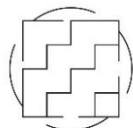
Our characters | Ō mātou uara

- **Ambition drives us** – Our ambition for our customers is high, and we always rise to the occasion. We help meet their business expectations by expecting greatness of ourselves.
- **Adventure teaches us** – Experimentation is more powerful than perfection, as only through learning from our missteps can we truly succeed. That's why 'giving it a go' is the best way to learn.
- **Honesty frees us** – We explore challenges with an open mind. Only when we ask questions and truly listen can we discover the right way forward.
- **Trust binds us** – Our people may be worlds apart, but it's trust that holds us together. Growing a nation is only possible when we keep promises and honour commitments.
- **Manaaki is us** – We celebrate the mana (strength and dignity) of each other as being equal to or greater than our own. We strive to enhance mana in everything we do through our hospitality, generosity and mutual respect.

It’s when these five characters work together that we truly become One Global Team – that’s the real superpower of our organisation and how we achieve so much for our customers.



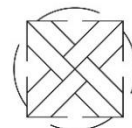
AMBITION
Drives us



ADVENTURE
Teaches us



HONESTY
Frees us



TRUST
Binds us



MANAAKI
Is us

How we lead at NZTE | Ā mātou kawenga ki Te Taurapa Tūhono

INVESTMENT ANALYST, KAITĀTARI HAUMI

Leadership at NZTE takes a broad definition. We see leaders as those who lead others. That can include formal people leaders, leaders through influence or those who are leading our customers. At NZTE we define leadership as *"enhancing mauri to deliver impact"*.



NZTE is committed to uplifting the mana of Māori as tāngata whenua and recognises Te Tiriti o Waitangi/ the Treaty of Waitangi as Aotearoa's founding document.