



Job Description

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Job Title Investment Officer	Job Location Dar es Salaam	Category -
Job Type Full Time	Job level Intermediate	Industry Insurance

Open to Expatriates
Only Open to Tanzanian Nationals

Minimum Requirements

Min Budget -	Max Budget -	Primary Industry Insurance: 3 Years
Secondary Industry -	Primary Category -	Secondary Category -
Certificate -	Qualification -	

Summary

This role is responsible for managing the company's investment portfolio on a daily basis in line with the company's strategic plan and in compliance with relevant policies and guidelines.

Responsibilities

A. Investment Activity

- Prepare an investment policy guide statement, outlining our investment objectives and relevant guidelines.
- Take the lead in the development of a high performing investment portfolio, informed by market conditions and economic trends.
- Coordinate the buying and selling of securities to maintain or achieve the Company's investment objectives, guided by a board approved plan.
- Maintain acceptable risk levels guided by time frames for liquidity needs, return expectations, and market conditions.
- Identifying/evaluating profitable investment opportunities and supporting the acquisition process. This shall include:
 - Conducting due diligence for new investments.
 - Developing/evaluating the structure and terms of the potential investment; and
 - Preparing investment proposals for consideration by Management and Board Investment Committees.

B. Portfolio Management

Provide on-going portfolio management and reporting on portfolio investments, to include:

- Coordinate the preparation of an annual investment plan and budget for recommendation to management and Board Investment Committee
- Monitoring and evaluating the actual performance of investment against agreed benchmarks, including monthly/quarterly investment reports as stipulated in the investment policies.
- Prepare quarterly portfolio reports for management team and Board Investment Committee
- Monitor the Company's liquidity to ensure that claims and spending commitments can be met.
- Provide advice to management on investment asset allocation to maximize returns at optimal risk.
- Prepare and monitor the investment risk register including mitigations.
- Make suggestions for changes to investment strategies based on observed market trends.

C. Internal Processes and Regulatory Compliance

- Review of long-term performance of investment portfolio against objectives, ensuring compliance with policy.

- ii. Where appropriate, recommend to the Board the appointment of investment consultants and their terms of reference.
- iii. Check legal and regulatory compliance including the insurance Act and regulations.
- iv. Ensuring company compliance with all relevant investment and financial regulations

D. Other Activities

- i. Conduct regular research to stay apprised about the state of the Tanzania's economy, global financial markets, and general current events and how they may affect company portfolio.
- ii. Contribute to the documentation of lessons learned from investment operations and emerging best practices in areas of expertise.
- iii. Participate in and contribute to information and experience sharing sessions with employees especially Finance department to create knowledge to the team.
- iv. Build and maintain strong relationships with all stakeholders to develop investment opportunities

Education & Qualifications

- A degree in finance or a relevant field from an accredited institution.
- Investment Analysis and Portfolio Management Certification.

Requirements

- At least 3 years in an Investment management environment in the financial industry, preferably insurance.
- Working knowledge of the Insurance industry
- Proven exposure to Risk Management and good understanding of principles of risk management
- Excellent report writing, presentation and communication skills
- IT proficiency i.e., experience in analysis using statistical packages, MS Excel, and other analytical tools
- Understanding of Continuous Process Improvement
- Analytical thinking and Problem-solving skills with attention to detail
- Leadership and People management skills

Reporting To

Head of Finance

Driving Licence

Not Required

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