

DEPARTMENT:	Investments	REPORTS TO:	Managing Director
TITLE CODE:	8023MR	DATE:	03/25/2026
POSITION CODE:	R2406406	ADMINISTRATIVE REVISION:	

Job Summary

The Investment Officer (IO) is an investment professional responsible for supporting asset class strategy and execution through rigorous research, analysis, and portfolio monitoring.

Reporting to the Managing Director and working closely with the Senior Investment Officer, the IO contributes to manager evaluation, due diligence, and portfolio analytics. This role is designed as a key development position, building the skills and experience required to progress to more senior investment responsibilities over time.

The IO will also support the organization’s transition toward a data- and technology-enabled investment platform, utilizing analytical tools and systems to enhance investment processes and insights.

Scope & Impact

- ▶ Supports a single asset class through research, analysis, and execution.
- ▶ Conducts due diligence and monitoring of less complex managers and investment opportunities.
- ▶ Contributes to portfolio analytics, reporting, and performance evaluation.
- ▶ Works under the guidance of the Managing Director and Senior Investment Officer.
- ▶ Builds technical and investment expertise over time.

Key Responsibilities

Investment Research & Analysis

- ▶ Conduct market research and analysis to support asset class strategy.
- ▶ Identify and evaluate investment opportunities and managers.
- ▶ Gather and synthesize data from multiple sources to support decision-making.

Due Diligence Support

- ▶ Conduct and support due diligence processes for investment managers and opportunities.
- ▶ Analyze manager performance, strategy, and organizational characteristics.

- ▶ Prepare investment memoranda and supporting materials.

Portfolio Monitoring & Reporting

- ▶ Track performance, exposures, and key metrics within the asset class.
- ▶ Assist in performance attribution and benchmarking analysis.
- ▶ Prepare reports and dashboards for internal and Board use.

AI Tools & Process Support

- ▶ Utilize data systems, analytical tools, and emerging technologies to support investment processes.
- ▶ Assist in validating and maintaining databases, models, and reporting tools.
- ▶ Contribute to AI and tech-enabled process improvements and workflow efficiency.

Team Collaboration & Development

- ▶ Collaborate with the Senior Investment Officer and Managing Director on investment projects.
- ▶ Collaborate with internal and external investment professionals of all levels.
- ▶ Mentor Analysts in asset classes and investment markets subject matters.
- ▶ Participate in meetings with managers and industry participants.
- ▶ Continuously develop investment knowledge and technical skills.

Qualifications

Experience

- ▶ 5–10+ years of relevant experience in investment management or related field.
- ▶ Foundational understanding of capital markets and asset class dynamics.
- ▶ Strong analytical and quantitative skills.
- ▶ Experience with financial modeling or data analysis preferred.

Education & Credentials

- ▶ Bachelor's degree required.
- ▶ Progress toward CFA, CAIA, or similar designation preferred.

Core Competencies

- ▶ Strong analytical and research skills.
- ▶ Attention to detail and intellectual curiosity.

- ▶ Ability to learn quickly and take direction.
- ▶ Effective written and verbal communication.
- ▶ Interest in data, analytics, and technology in investing.

Why This Role

- ▶ Opportunity to build a career in institutional investing within a sophisticated platform.
- ▶ Exposure to advanced asset class strategy, manager selection, and portfolio construction practices.
- ▶ Mentorship from experienced investment professionals.
- ▶ Development within a technology-forward, innovation-driven organization.

Additional Information

This is an at-will position. The role requires periodic travel for investment due diligence, industry engagement, and conferences.

Physical, Mental and Environmental Conditions

The following is a description of the physical and mental abilities that are customarily required to perform the essential job functions of this position.

Physical and Mental Requirements

- ▶ Speak and hear well enough to communicate in English clearly and understandably in person, over the telephone, and in small groups.
- ▶ Manual dexterity sufficient to use hands, arms, and shoulders repetitively to operate a telephone, keyboard, write and use a calculator.
- ▶ Mental stamina to interact professionally with members of the Board of Retirement, Employers, peers, and members.
- ▶ Vision sufficient to read fine print and a computer monitor.
- ▶ Independent body mobility, agility, and stamina to stand, walk, stoop, bend, and twist, to access a standard office environment.
- ▶ Ability to sit for prolonged periods of time.
- ▶ Body strength sufficient to lift up to 15 pounds and carry files.

Environmental Conditions

- ▶ The primary work place is in an office environment, working with standard office equipment.
- ▶ Peripheral office equipment generates a quiet to moderate noise level.



Job Description Investment Officer (Real Assets)

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- ▶ Operates in an environment that includes elected officials, non-elected officials, government agencies, community interest groups, and the general public in the development and coordination of OCERS affairs.
 - ▶ Out of area travel may be required to attend professional conferences and meetings.

Acknowledgement

By signing below, I acknowledge that I have reviewed and discussed the contents, requirements, and expectations included in this job description with my supervisor and a copy has been provided to me.

Employee Signature

Date

Supervisor Signature

Date

Reviewer Signature

Date
