

### 1. GENERAL INFORMATION

<b>Role Title</b>	Investment Manager
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### 2. WORK OUTPUT DESCRIPTION / PURPOSE STATEMENT OF THE JOB

<ul style="list-style-type: none"> <li>• Efficient management, preparation and presentation of investment memos for SMEs as well as large companies, including mandate fit, financial analysis, operational analysis, sector impact and beneficiary developmental areas.</li> <li>• To lead direct reports during the due diligence process leading to preparing and finalising investment memos.</li> <li>• Managing stakeholders in relation to investment management with a developmental mindset, including beneficiaries, AITF members and internal stakeholders.</li> <li>• Support the Chief Investment Officer in the implementation of the Investment strategy aligned to the organisation’s overall strategy.</li> <li>• Ensure strict compliance when assessing use of funds in investment cases, and adherence of beneficiaries to sound financial practices to manage return on investments for the AITF.</li> <li>• Support with the general management of key stakeholders (OEMs, beneficiaries and service providers), which includes regular meetings and alignment discussions.</li> <li>• Manage the opportunity pipeline by analyzing, validating and collating opportunities into comprehensive reports, which are used to report to MIC, BIC, the AITF Board and Co-Funders.</li> </ul>
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### 3. CORE WORK OUTPUTS

KEY PERFORMANCE AREAS / AREAS OF RESPONSIBILITY	OUTCOMES / DELIVERABLES / MEASUREMENT CRITERIA
<b>GENERAL MANAGEMENT</b>	<ul style="list-style-type: none"> <li>• Support the AITF in the implementation of the organisation’s overall strategy.</li> <li>• Leading direct reports by providing development, guidance, training, KPI setting and periodic measurement.</li> <li>• Strong team player, willing to multitask and stretch themselves and provide regular guidance to other team members within a compact team.</li> <li>• Enhancing investment management systems, policies and approaches in order to improve efficiency, enhance the beneficiary journey and ultimately achieving funding objectives.</li> </ul>
<b>OPPORTUNITY DUE DILLIGENCE, CASE PREPARATION AND PRESENTATION</b>	<ul style="list-style-type: none"> <li>• Manage and executing the progression of opportunities from application to final approval, including designing/ refining and managing screening, due diligence and credit memo submission processes.</li> <li>• Management of due diligence planning and execution, including coordinating site visits as well as managing the gathering and interrogating beneficiary information.</li> <li>• Building bottom-up financial models for companies including income statement, cash flow and balance sheet based on client model, evidence collected, market analysis and other sources.</li> </ul>

KEY PERFORMANCE AREAS / AREAS OF RESPONSIBILITY	OUTCOMES / DELIVERABLES / MEASUREMENT CRITERIA
	<ul style="list-style-type: none"> <li>• Assisting the beneficiary with their application through the lens of business development.</li> <li>• Recommend an optimal funding mix per beneficiary and articulate the overall impact on the fund and annual plan.</li> <li>• Negotiate beneficiary term sheets and opportunity funding with assistance from the legal department.</li> <li>• Assist in managing deal execution process and conclusion of legal agreements.</li> <li>• Add strategic value to investments and arrange exits.</li> <li>• Providing clear and regular feedback to beneficiaries, AITF members and internal stakeholders on the challenges and possible solutions of beneficiary applications.</li> <li>• Ensuring all information, from application to approval, complies with company policies and processes.</li> </ul>
<b>GOVERNANCE AND REPORTING</b>	<ul style="list-style-type: none"> <li>• Produce and submit the relevant reporting/ disclosure documentation as required by the relevant prevailing statutes and governing bodies (e.g., NCR, Reserve Bank, FSCA, FAIS etc) to immediate manager and/or relevant stakeholders.</li> <li>• Assist in preparing and submit monthly, quarterly, and annual investment and planning inputs into required reports to immediate manager and/or relevant stakeholders, enabling sound business decision making.</li> </ul>

#### 4. JOB SPECIFICATION

<b>Educational Level / Qualifications</b>	<ul style="list-style-type: none"> <li>• Post Graduate Degree in Finance or a related field.</li> </ul>
<b>Advantageous (Educational Level / Qualifications)</b>	<ul style="list-style-type: none"> <li>• MBA, Masters degree, CA(SA) or CFA</li> </ul>
<b>Previous Work Experience</b>	<ul style="list-style-type: none"> <li>• 8 to 10 years of experience in a similar role in South African banks, private equity firms or developmental finance institutions.</li> <li>• Strong deal sourcing and execution skills</li> <li>• Investment analysis and management</li> </ul>
<b>Legal requirements</b>	<ul style="list-style-type: none"> <li>• Clear criminal record</li> </ul>