



UK REAL ESTATE

Experts in UK real estate investment and asset management



APAM

SENIOR PORTFOLIO ANALYST

COMPANY: APAM Ltd

LOCATION: London

REPORTS TO: Director of Portfolio Management

TYPE OF VACANCY: Permanent

TIME/PART TIME: Full Time

WHY APAM?

APAM is a specialist in UK Real Estate Investment, Asset Management, Financing, Accounting and Client Reporting. We have a proven track record of maximising value in all phases of the investment cycle and provide solutions across real estate investment management, asset management, property, facilities management, corporate services and development management.

APAM's work with institutions, private clients, banks, debt funds, servicers, insolvency practitioners, retailers, trustees and private equity partners gives us a unique and comprehensive market insight.

In a continually complex and changing market, the breadth and depth of our retained intellectual property enables us to provide informed forward-looking insight into real estate trends, strategies and opportunities throughout the UK.

ABOUT THE TEAM

Our team of over 50 talented professionals uses its forensic knowledge of real estate, across the UK, to maximise value for our clients. We take pride in being an accountable business and being responsible for our decisions.

As part of the Catella Group, APAM provides clients with access to best-in-class advisers across 15 countries and works as a team to provide solutions across real estate asset, investment and property management, and financing, supported by our best-in-class corporate services platform.

2020 was an unprecedented year but we embraced the challenges and are very proud of the team's successes. 16 talented people joined APAM, reinforcing the investment, accounts, portfolio, asset and property management teams. Assets under management also grew by £1 billion with 40 assets acquired and 40 sold.

ABOUT THE ROLE

This role is ideal for a Senior analyst or Analyst looking to make the next step up in their career, with a passion for UK real estate seeking to join a fast paced, dynamic and friendly team.

Responsible for client facing mandates, you will be collecting, maintaining and evaluating data and assembling analysis on quarterly and annual performance.

In addition, you will be responsible for providing research to enable our clients, future clients and management team to make strategic investment decisions.

This is a great opportunity for an individual looking to contribute to the success of a developing business area within an exciting growing organisation.

KEY RESPONSIBILITIES:

As a Senior Analyst, your role will be broad with key responsibilities including managing and maintaining data analysis, reporting and cashflow modelling for your own mandates. Responding to team data queries, maintaining data systems, modelling, and analysing real estate data and producing and evaluating research data. Responsibilities may change from time to time as team planning requires or for staff development purposes and there will be many opportunities to take on projects and process improvements.

Specific responsibilities include but are not limited to:

Real Estate Analyst

- Providing detailed cashflow modelling and sensitivity analysis which will be used in preparation of strategy analysis and to track against on an ongoing basis.
- Coordinate onboarding of portfolios across service lines and lead ongoing mandate meetings.
- Modelling and analysing financial data regarding refinancing, acquisitions, and/or disposition of investments.
- Track and analyse all aspects of real estate data - collecting, collating, and updating tenancy and asset level data.
- Collaborate with investment and asset management teams in underwriting, due diligence and maintaining current multi-sector portfolios data.
- Present compelling trends and analyses to internal teams and clients on a regular basis.
- Prepare and present reports to clients, managers and internal committees including financial snapshots and qualitative summaries.
- Construct tables and graphs to show trends, upcoming events etc.
- Serve as a portfolio "expert" with detailed knowledge of assets under management
- Identify gaps in data and uniformity issues.
- Monitor and analyse third party performance KPI data.
- Actively assist in the management of client requests and data management for external and internal clients.

Real Estate Research

- Responsible for managing the production of ad-hoc research and analysis on tenant covenants, comparable sales and lettings, industry analysis and public company performance.
- Top-down macroeconomic analysis covering economy, property markets and market trends.
- Assemble and interpret national, regional and local economic and property market information to create views about rental growth, pricing and prospective total returns for property markets in the UK. This information will be assembled both from literature, maintained databases, and from meetings with senior analysts, investment professionals and Directors.
- As requested, produce analysis, research papers and presentations for public/external consumption to help sales and marketing efforts. This may include involvement in pitches to clients.
- Assist in supporting research to assess specific proposed transactions.

KEY COMPETENCIES

We use our key competency framework to recruit and develop our team because we want to ensure our people have the ability to lead and make a real impact on the work we do.

The right candidate:

- Highly numerate, with exceptional analytical, problem solving and modelling skills.
- Ability to communicate complex, abstract and/or difficult messages in a simple, clear manner.

- Knowledge: 2-3 years' exposure to commercial real estate with a good understanding of private equity and real estate investments. A Bachelor's degree in Real Estate, Business, Economics, or related field is desirable.
- Ability and agility to work across multiple real estate asset classes.
- Demonstrated competency in all aspects of asset life cycle including deal analysis, financial modelling, due diligence, reporting and disposition.
- Strong knowledge of typical lease terms, loan documents, acquisition contracts, partnership agreements and related property documents.
- Research skills: possess strong data collection, validation, and auditing skills and be up to date with recent trends and news in the industry.
- Entrepreneurial: a self-starter with the ability to work independently and think proactively and strategically.
- Strong Team player: the capability to work within the team, and work within a diverse, collaborative, and driven professional environment.
- Preferable but not essential: understanding of financial structures (including debt and equity, listed and private, JVs, direct and indirect instruments)
- Ability to work effectively under pressure.

Ownership / Doing the right thing:

- Serve as a market "expert" with extensive detailed knowledge of the macro and micro factors affecting the market.
- Become the subject matter authority on the applicable data fields - Deliver concise and accurate information in written and verbal format in a timely manner.
- Foster a culture of best practice and discipline in your work.

Driving Value and Financial Acumen:

- Proactively leverage on knowledge from research for products, projects, and business development efforts.
- Develop, implement, and lead strategic research plans that align with APAM's objectives.

APAM Passion / Relationships:

- A positive attitude that demonstrates pride at the workplace.
- A passion for Real Estate with a good understanding of macro trends and historical perspective.

Team and Relationships:

- Seeking feedback from others and embracing cross team collaboration – proactively diarising project/reporting review meetings as appropriate and required.
- Positively represent the organisation by building strong relationships with internal and external clients, including being personally client-facing and externally focused on new business efforts.

Leadership:

- The willingness and ability to lead, guide and motivate others towards a common goal.

SPECIAL REQUIREMENTS (e.g. travel, unsocial hours)

- Normal Hours of work for this role are 5 days a week 9.00 am – 6:00 pm based in the Company's London office –please note we currently have special arrangements in place for working safely during the coronavirus outbreak.
- Must be flexible and able to work extended hours as likely necessary on occasion.
- May be required to travel both within the United Kingdom and abroad

SKILLS AND EXPERIENCE

Technical:

- Excellent business user of MS Office software including; Word and Excel.
- Experience linking sets of data together using Excel and be comfortable with advanced use of Excel including but not limited to:
 - IF, Lookup and Index/Match Functions
 - Pivot tables
 - Data visualisation

Experience:

- Ability to work in fast paced dynamic environment
- Ability to learn and apply concepts quickly
- Resilient problem solver
- Strong verbal and written communication skills
- Previous experience with VBA, Cash Flow Models, and financial statements within the Property/Real Estate Industry would be desirable but not essential
- Analytical skills and problem-solving abilities: high level analytical skills to run financial models as well as analyse all aspects of real estate markets
- Previous accounting experience/background would be desirable but not essential

Education:

- A Level education or equivalent.
- Degree education or equivalent in a related discipline (desirable).

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