



UNIT TRUST OF SAMOA (MANAGEMENT) LIMITED
CONTRACTUAL EMPLOYMENT

APPLICATION INFORMATION PACKAGE
CHIEF INVESTMENT ANALYST

1. HOW TO APPLY:

I. MAKING AN APPLICATION

- a. For your application to be considered you **MUST** complete and submit **ALL** these requirements;
- Complete and signed Application Form
 - Certified Copies of all academic achievements/qualifications/training etc.
 - Recently updated curriculum vitae
 - 3 written references (relevant only to this application)
 - Submit a valid police clearance report (issued within the past 3 months)

ALL INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED FOR SHORTLISTING.

II. SUBMISSION OF APPLICATION

- a. All applications should be delivered in a seal envelope and address to:

The Chief Executive Officer
Unit Trust of Samoa (Management) Ltd
Level 3, Development Bank of Samoa
Apia, Samoa

- b. All applications for the position will be closed on **Friday 28th April 2025 at 4.00pm.**
- c. For more information, please do not hesitate to contact our HR team on emails. fiaputa.lino-toetu@utos.ws & sera.moses@utos.ws or telephone 24969.

LATE APPLICATIONS WILL NOT BE ACCEPTED

2. About the Unit Trust of Samoa (UTOS)

UTOS (Trust) is a private trust owned by the Unitholders with its assets entrusted to a Trustee Company which holds in trust the funds of the unitholders. These funds are invested into a diversified portfolio of assets ranging from term deposits, government securities and shares in privately owned companies. Its social objective is inclusivity; allowing for accessible and affordable investment for ordinary Samoans. Its commercial objective is to generate returns for the unit holders.

For more information about UTOS (Trust) and UTOS (Management) Company please refer to the website www.utos.ws

3. About the Position:

JOB DESCRIPTION

Job Title:	CHIEF INVESTMENT ANALYST ('CIA')
Reports to:	Chief Executive Officer, Unit Trust of Samoa (Management) Ltd
Supervises:	Unit Trust of Samoa (Trust) Investment Portfolio
Salary:	\$94,624.00 – \$106,452.00 (max) per annum
Term:	Contract for 3 years
Other benefit:	The staff will be entitled to staff benefits as outlined in the <i>Human Resource Management Policy and the Performance Management Manual 2023</i> unless otherwise specified in the contract. _____

Position Overview

The Chief Investment Analyst ('CIA') is responsible to the Chief Executive Officer ('CEO') of the Unit Trust of Samoa (Management) Ltd (the "***Manager***") for overseeing investment matters in accordance with all relevant legislations, Central Bank of Samoa Prudential Guidelines for Unit Trusts, Trust Deed and Investment Policy.

The CIA is also responsible for monitoring of the investment portfolio of the Unit Trust of Samoa (the "***Trust***"). He or she will ensure that returns, risks and asset allocation are within targets and guidelines. The CIA will perform financial review and assessment of current investments and prepare reports for the CEO, including any warning signals of divergence from targets and Investment Policy guidelines. In addition, he or she will produce financial forecasts and

models for each investment, and perform valuations of investments from time to time.

The CIA is responsible for seeking investment opportunities and make recommendations on financing sources. He or she will perform due diligence and financial analysis of potential investments and prepare proposals, and make recommendations on these opportunities, to the CEO.

The CIA is responsible for preparing reports to the Investment Committee and Board.

The CIA is also expected to be able to work in a challenging environment and be flexible in working with a team of dedicated individuals to achieve annual targets, mission and vision of the Company.

Duties:

Technical and Strategic:

- Oversee all investment matters of the Unit Trust of Samoa (the “Trust”); ensuring sound internal controls are maintained, operations are efficient and effective, and complies with the Investment Policy and Central Bank of Samoa Prudential Guidelines for Unit Trusts.
- Carry out market research for investment opportunities to cover acquiring shares in lucrative companies and provide clear recommendations to the CEO on the option that will maximize returns for UTOS.
- Prepare investment proposals for the Investment Committee and Board.
- Conduct valuations of current investments from time to time or when necessary.
- Advise and make recommendations to the CEO on the investment asset allocation from time to time or when necessary to ensure that target returns are on track and achievable.
- Conduct scoping studies of potential investment opportunities and lay out a plan for initial communication and follow up meetings.
- Form relationship with individuals in banks of related nature of work, request information and do follow ups.
- Assess all investment opportunities that have been identified and make recommendations to the CEO, and subsequent to the Investment Committee for doubtful/declined proposal and reasons for doing so.
- Ensure that new investment or variations to investments approved by the Board are also approved by the Trustee.
- Assist the Chief Finance Officer with the preparation of the Trust’s monthly and annual report.

Monitoring and Evaluation

- Monitor the performance of the investment portfolio in accordance with the Investment Policy.
- Conduct financial and risk analysis of investment proposals and present clear recommendations to the CEO outlining the best options to invest Trust funds.

Leadership and Management

- Actively participate as part of the Leadership and Core Executive Management Team in the decision-making and governance processes of the organization.
- Assist in the development and implementation of the following Company Reports/Plans
 - Prospectus
 - Corporate Plan
 - Business Plan
 - Performance Management Plans/Appraisals
 - And any other relevant plans/reports.
- Collaborate with Human Resource Unit to develop training resources and materials on relevant technical trainings when required.
- Represent the Company in local and international forums when required.
- Act as Chief Executive Officer when required.

Essential:

- A relevant Bachelor's Degree, preferably a degree in Finance and Accounting or Investment

Skills/Knowledge

<i>Essential</i>	<i>Desirable</i>
<ul style="list-style-type: none">• At least seven (7) years of relevant work experience in Finance and/ or Investment industry in Samoa or overseas with demonstrated excellent investment analytical skills and experience.• Proven experience in finance statement analysis and interpretation.• Good knowledge of databases, spreadsheets, word processing and computerized accounting systems	<ul style="list-style-type: none">• Proven work experience in funds management• Proven experience in the investment valuation and analysis• Proven experience in financial forecasting and modeling.• Proven experience in company due diligence, restructure, financial review and transaction negotiation.• Proven experience in off-shore investment, exchange rate analysis and monitoring.

Benefits

Duration: 3 years term contract

Salary: \$94,624.00 – \$106,452.00 (Max)

Hours of Attendance: The standard hours of attendance are Monday to Friday from 9.00am to 5.00pm excluding Public and Commission holidays that are generally observed in the public service and declared by the Commission.

Performance Reviews: The Appointee's performance shall be reviewed in accordance with the Performance Management Guideline.

Annual Leave: 20 days annual leave per annum

Sick Leave: 20 days sick leave per annum.

Other Leave: All other leaves are subjected to the rules set out in the UTOS Human Resource Management Policy Manual 2023.

End of Contract Benefits: The Appointee is entitled at the expiry of the Contract Term, to a payment equivalent to 10 working days for every contract year served at the salary rate paid to the Appointee on cessation of employment.

National Provident Fund: 10% contribution, fortnightly salary

Accident Compensation Corporation: 1% levy, fortnightly salary

Duty Travel: Approval of the Board of Directors