

Job Title:	Head - Research	Reports to:	Managing Director
Unit:	Brokerage	Department:	Investment Bank
Grade:		Date:	
Job holder:		Supervisor:	
Signature:		Signature:	

Job Purpose Statement

To deliver comprehensive analytical products that support informed decision making. The role holder will collaborate with internal and external stakeholders to produce cutting-edge, timely research on equities and fixed income, primarily in Kenya with potential expansion to international markets as required. Key responsibilities include developing and distributing high quality written & verbal research content for both institutional and retail investors' audiences. The position also encompasses mentoring and developing associate analysts to ensure comprehensive, commercially viable market coverage and build the team's analytical capabilities. He/she will be instrumental in establishing NCBA IB as a trusted source of market intelligence while fostering a culture of analytical excellence within the research team. They will also form a key part of producing research to support transactions that IB is participating in.

Key Accountabilities (Duties and Responsibilities)

Perspective	% Weighting (to add up to 100%)	Output
Research	40%	<ul style="list-style-type: none"> ▪ Strategic Development: Contribute to the development of IB research strategy, including determining optimal report frequency, coverage scope, and distribution channels ▪ Research Production: Deliver high-quality, commercially viable research products for dissemination across all company platforms and client touchpoints ▪ Investment Identification: Proactively identify and analyze investment opportunities tailored to IB client portfolios and risk profiles ▪ Analytical Support: Provide specialized analytical research and market insights to support broader banking operations and strategic initiatives ▪ Advisory Collaboration: Partner with the advisory

		team to support client pitches, transaction processes, and strategic engagements through research-driven insights
Customer	30%	<ul style="list-style-type: none"> ▪ Stakeholder Engagement: Build and maintain strong relationships with key investors, including institutional clients and high-net-worth individuals (HNWIs) ▪ Corporate Relations: Establish and nurture robust relationships with management teams of companies under research coverage ▪ Market Engagement: Collaborate with the brokerage team to plan and execute regular roadshows, presenting investment themes and company-specific opportunities to target audiences ▪ Cross-Functional Partnership: Foster close collaboration with IB teams and broader bank divisions to ensure research outputs align with organizational objectives and customer needs.
Internal Business Processes	20%	<ul style="list-style-type: none"> ▪ Quality Assurance: Establish and maintain rigorous quality standards to ensure all research products meet high quality and quantitative benchmarks while remaining relevant and responsive to current market conditions.
Learning and growth	10%	<ul style="list-style-type: none"> ▪ Team Development: Assume full responsibility for the existing research team, developing and implementing a comprehensive strategy to upskill, train, and mentor team members to enhance their analytical capabilities and professional growth. ▪ Self: Assume full responsibility for own training both formal and on the job. ▪ Ensure compliance with the ICIFA annual training requirements ▪ Achieve NCBA Group Learning Hours' objectives.

Job Dimensions

Reporting Relationships: jobs that report to this position directly and indirectly	
Direct Reports	Research Analysts
Indirect Reports	None

Stakeholder Management: key stakeholders that the position holder will need to liaise/work with to be successful in this role.	
Internal <ul style="list-style-type: none"> • Global Markets • Finance • Executive • Business Units Heads – Corporate, Retail, Business Banking • Business Units Relationship Managers • Branches • Financial Market Operations • Legal • Market Risk 	External <ul style="list-style-type: none"> • Existing and Prospective Clients • Competitors • Regulatory Authorities • Fund Managers • Business and Research partners

Decision Making Authority /Mandates/Constraints: the decisions the position holder is empowered to make (Indicate if it is Operational, Managerial or Strategic). Please also highlight any budgetary control responsibility if applicable for the role.
<ul style="list-style-type: none"> • Company and macro modelling and subsequent forecasts. • The content and direction of reports and presentations, where relevant.

Work cycle and impact: time horizon and nature of impact (Planning) (e.g. Less than 1 week, 2 weeks, 2 weeks – 1 month, 1month – 3 months, 3-6 months, 6-12months, above 1 year)
3-12 months

Ideal Job Specifications
Academic: <ul style="list-style-type: none"> • Bachelor's degree in economics or equivalent. A CFA qualification is preferred. Professional: <ul style="list-style-type: none"> • ICIFA Membership. • Practical experience in use of MS Office applications. • Practical experience in the use of Statistical software. • Practical experience in use of Econometric software. • Practical experience in financial modelling. Desired work experience: <ul style="list-style-type: none"> • At least 5 years' experience in research in an investment bank or similar financial institution. • Strong quantitative background with experience in equities modelling and producing high quality written research.

NCBA Values

- Driven - We are **passionate**, make **bold decisions** and **learn** from our failures. We seek **new challenges** and appreciate **different views** constantly raising the bar. We explore our **full potential**.
- Open - Our interactions are **candid, honest** and **transparent**. We **listen** to each other and our clients. We are **inclusive** and always **respect** each other.
- Responsive – We put our **customer's interests** at the heart of all that we do. We are **proactive**, **act quickly** and **resolutely** to deliver results. We keep it **simple** and seek new ways to **improve**.
- Trusted - As a **trusted partner** we do what is morally right always. We keep our **word**. We are **accountable** and **believe** in each other.

Job competencies

Technical Competencies

Technical Skills

- Strong quantitative skills.
- Strong analytical and problem-solving skills
- Excellent understanding of Markets and Policy.
- Be able to know and monitor the key economic indicators that will impact on the core business and be able to explain that to customers.
- Proven experience in report writing.
- Public relation skills.

Behavioral Competencies

Interpersonal skills

- Personable and confident with the ability to converse professionally with clients
- Ability to market and establish lasting client relationships
- Positive attitude and work ethic
- Enthusiasm to learn about the wide range of products and roles within the bank.
- Ability to work independently and in a team environment.
- Possess resilience to work in a challenging and changing, high-volume, fast paced environment.
- Ability to think globally, creatively, and to be innovative.
- Maintain a sense of urgency and ability to execute quickly and efficiently.
- Effective written/verbal communication skills.