

## **JOB DESCRIPTION**

### **Engagement Associate/Analyst**

#### **FIRM OVERVIEW:**

Kabouter Management, LLC ("Kabouter"), is a registered investment adviser with approximately \$5 billion in AUM as of December 31, 2020. Located in downtown Chicago, Kabouter considers itself one of the premier boutique investment managers in the U.S. focused solely on investing in micro- and small-cap public companies internationally.

Kabouter currently provides investment management services by way of four primary international strategies to privately offered investment funds, separately managed accounts and other pooled investment vehicles. The investment style employed is best characterized as a fundamental, long-term holding strategy with a focus on friendly engagement and environmental, social, and governance ("ESG") integration.

As part of Kabouter's friendly engagement, after investing, Kabouter engages with portfolio company management teams to help improve certain aspects of their business, including enhanced investor relations activities, strategic and financial advice, and ESG initiatives.

#### **POSITION SUMMARY:**

The Engagement Associate/Analyst is part of, and works closely with, the research team to analyze, develop and execute on various aspects of Kabouter's portfolio engagement initiatives, including implementation of ESG policies and disclosures, strategic communications, enhancement of investor relations efforts, competitive market consultations, and joint venture or take-private opportunities.

This position reports to the Senior International Equity Analyst & Engagement Manager, however, works closely with the entire investment team on a day-to-day basis to support, develop, and enhance portfolio engagement initiatives.

#### **RESPONSIBILITIES:**

- Collaborate with Kabouter's research team to develop an early-stage investment framework for sourcing companies who will benefit from engagement efforts and remain engaged throughout the investment lifecycle of the holding
- Provide fundamental research, data, and competitive analysis for the research team's consideration and make recommendations as they explore strategic introductions, joint ventures, and private equity options for portfolio companies
- Develop strategic partnerships with portfolio company executives and lead efforts to develop perception studies, help facilitate prospective investor roadshows, prepare presentations, and enhance company narratives, including conference call and Q&A coaching
- Partner closely with portfolio company management teams to analyze, develop, and implement ESG policies, including enhancement and quality of business practices; work with ESG rating agencies to champion improvements with respect to company ratings, methodology, scope, coverage, and the overall quality of analysis

- Quantify material ESG impacts on Kabouter strategies and report these in line with UNPRI guidelines
- Third-party engagement and communications with industry impact and sustainable investing constituents, including Sustainalytics, UNPRI and others
- Proactively identify, educate, and communicate with potential investors of portfolio companies
- Create and maintain internal strategic communication materials on Kabouter's consultative and engagement initiatives
- Any additional projects as assigned by portfolio managers and/or analyst team, including data collection, competitive analysis, drafting, editing, and production of publications and electronic media used by portfolio companies
- Remain current on industry best-in-class practices through conference attendance and/or networking events

**REQUIRED  
QUALIFICATIONS:**

- BA or BS degree required; ideally in a field of study providing both the skills and context for analyzing large amounts of data and the poise to deliver compelling investor narratives.
- Minimum of 5 years related experience
- Fluency in English required; able to speak, read, and write in at least one additional language a plus
- Strong presentation and critical thinking skills
- Exceptional written, oral, visual, and interpersonal communication skills
- Ability to both work well independently and collaborate as part of a team
- Demonstrated interest in equity markets and investing
- Superior organization, time management, and prioritization skills
- Takes initiative and exhibits creativity with problem solving
- Client service mindset with an ability to be both engaging and analytical
- Proficient use of Microsoft Office 365 tools, specifically Word, Power Point, and Outlook; solid Internet search and browsing capabilities

**PREFERRED  
QUALIFICATIONS:**

- MBA or relevant MA/MS in Finance, Marketing, Strategic Communications, or Economics a plus
- Previous management consulting, investor relations, corporate communications, or sell-side broker experience strongly preferred
- Eligibility to work in the U.S. without company sponsorship
- International work experience and global orientation
- Certified Management Consultant (CMC) a plus
- Graphic design skills and experience a plus
- Basic knowledge of fundamental research tools such as Bloomberg, Capital IQ, and FactSet
- Familiarity with ESG and corporate governance principles and framework, such as UNPRI, Sustainalytics and other third-party sustainable investing rating agencies
- Experience applying ESG in an asset management environment

**CONTACT:**

To be considered for this opportunity, interested candidates should apply by sending a cover letter, resume, and any additional supporting documents to [recruitment@kabouterfund.com](mailto:recruitment@kabouterfund.com).