



## **BRIDGEWAY CAPITAL MANAGEMENT JOB POSTING**

### **Investment Performance/Risk Management Analyst – Responsible Investing Team**

#### **Bridgeway Capital Management**

Bridgeway Capital Management is a Houston-based investment management firm founded in 1993. We believe our strong and principled organizational culture and our disciplined investment process allows us to deliver innovative investment solutions to institutions, advisors, and individuals. At all times, Bridgeway strives to put investors' interests first by emphasizing integrity, performance, efficiency, and service. Bridgeway is a leader in relational investing, which unites results for investors with returns for humanity. Our approach to investing is statistical and evidence-based, motivated by a passion for servant leadership and global impact, which we accomplish by donating 50% of our firm's earnings to organizations that positively impact humanity. Based on the evidence, we firmly believe that diverse and inclusive teams and organizations make better decisions and achieve better outcomes.

#### **Purpose**

The Investment Performance/Risk Management Analyst is an experienced statistician responsible for overseeing all aspects of performance analysis and reporting, from validating and reporting performance numbers to analyzing performance through holdings and returns based attribution analysis. This analyst is responsible for developing mathematical and statistical models to analyze data, applying mathematical theories and techniques to calculate and interpret portfolio characteristics and statistics, recommending and validating investment strategy benchmarks, and interpreting data and communicating analyses to technical and nontechnical audiences including Bridgeway, prospects, and clients. Additionally, this statistician is responsible for validating risk measurement, analyzing risk exposure, helping to design BCM risk policies and procedures. The individual responsible will analyze data to inform operational decisions or activities, preparing risk reports for Bridgeway and clients and working collaboratively with the Investment Management team to ensure risk-related quant models accurately reflect risk measurement.

#### **Principal Responsibilities**

- Generate, validate, analyze, report and communicate performance attribution data (both holdings and returns based).
- Maintain strong understanding of factors and impact on performance.
- Oversee reconciliation process of sub-advised account returns to ensure accurate reporting.
- Design new reports for Bridgeway Funds Board of Directors, internal stakeholders, prospects, and clients as needed.
- Data stewardship, quality, and governance for operational data utilized across the organization, including client reporting, marketing materials, and other analytics.
- Assist in design, development, and management of future enterprise data warehouse and enterprise reporting and analytics efforts.
- Collaborate with and oversee various service providers involved in data production, management, and delivery.
- Serve as subject matter expert for data licensing and contracts, optimizing spend and operational efficiency.
- Review marketing materials, Annual/Semi-Annual Reports and Prospectus for data quality.
- Calculate portfolio characteristics and statistics and provide interpretation of these measures.
- Analyze account returns and performance attribution and proactively communicate analysis to help the Investment Management and Client Service and Marketing teams explain performance results.
- Conduct specialized analysis as needed to explain performance and respond to inquiries.
- Identify, recommend, and validate usage of appropriate portfolio benchmark for investment strategies.
- Responsible for developing performance analysis for future strategies.
- Ensure standardization of performance analysis and reporting across all products, services, and functions.
- Support GIPS program.
- Collect, validate, and communicate risk measurement data. Assist the Investment Management and Client Service and Marketing teams in explaining risk exposure.
- Use statistical software to analyze data and create visualizations to aid decision making in analyze, escalate, and resolve risk management issues.

- Design and prepare risk measurement reports.
- Ensure standard employment of risk measurement policy and procedures and reporting across all products and services and functions.
- Oversee service providers related to performance analysis and risk management.
- Develop, document, and maintain procedures.
- Provide support to other Bridgeway teams as needed.
- Support Bridgeway's Partners and philosophy inside the company and in our community.

## Qualifications

### *Experience/Education*

- Undergraduate degree, preferably mathematics, statistics or finance related.
- Minimum of five years of experience; MBA, CFA or CIPM preferred.
- Experience with FactSet is preferred.
- Programming skills preferred.

## Skills/Passions

- Proven/hands on expertise with performance analysis and reporting.
- Familiarity with enterprise data warehousing and reporting.
- Experience with index, market data, and analytics providers and licensing.
- Service provider management expertise.
- Effective at analyzing, designing, reengineering, documenting, and implementing processes.
- Champion of continuous improvement.
- Superior collaboration and communication skills.
- Adaptable, flexible, and responsive to multiple and changing priorities.
- Ability and desire to multitask.
- Ability and desire to work in a Servant Leadership culture.
- Strong team player.
- Strong Excel skills.

We are an equal-opportunity employer. Diversity, equity, and inclusion are at the core of who we are at Bridgeway. Our holistic commitment to people embraces and supports who each person is, how each person thinks, and what each person strives to be.

Submit resume via [careers@bridgeway.com](mailto:careers@bridgeway.com)

