

## Detailed Role Description

<b>Job Title</b>	Investment and Portfolio Manager
<b>Department</b>	Investments
<b>Reports to</b>	Chief Executive Officer
<b>Location</b>	On Site-Mzuzu, Malawi
<b>Role Profile</b>	Early -Mid-level professional

### Role Purpose

The Investment and Portfolio Manager main responsibilities are the development and monitoring of a strong investment portfolio that will enable Emerge Fund to reach long-term impact investing goals. In collaboration with CEO, the IPM be responsible for building the pipeline of enterprises that meet the investment criteria of current and future funds administered by Emerge Fund. Pipeline enterprises will include, but are not limited to, climate focused micro small and medium enterprises (MSMEs).

The Investment and Portfolio Manager will collaborate closely with local teams to introduce investment products to potential pipeline enterprises and cultivate relationships with qualified candidates. The IPM will conduct sourcing, due diligence and screening on investment candidates and structure investments. The IPM will be responsible for the execution/disbursement of investments and the subsequent portfolio monitoring and reporting.

### Scope of Responsibilities

#### Role Responsibility 1: Investment strategy planning, management and implementation

##### Key tasks:

- Collaborate with all members of the Emerge Fund team on the design of investment strategies aligned with the needs of clientele
- Contribute to the development of Clients investment plans in target geographies including identification and analysis of priority sectors for investment.
- Monitor regulatory environments and assess eligibility of different types of enterprises.
- Contribute to the development of policies and processes for Emerge Fund investment, investee reporting, portfolio analysis and management, investor reporting and compliance.
- Track investment pipeline in assigned geographies and sectors to ensure alignment of capital needs with fundraising activities.



## Scope of Responsibilities

### Role Responsibility 2: Investment Management

#### Key tasks:

- Develop investment pipeline for Emerge Fund through the identification of potential investees, marketing of Emerge Fund investment products and cultivation of relationships.
- Prepare credit appraisal reports and investment proposals.
- Present eligible investments to the CEO and eventually the Emerge Fund Investment Committee.
- Ensure appropriate currency risk management through currency hedging contracts on proposed investments.
- Lead finalization of investment documents by working closely with Clients and legal counsel.
- Working with Emerge Fund Operations team, ensure timely disbursement/investment of funds including satisfaction of conditions precedent and local regulatory requirements.
- Assess the need for technical assistance that would strengthen an enterprise's status as a prospective investee.

### Role Responsibility 3: Portfolio Analysis and Management

#### Key tasks:

- Manage relationships with client investees.
- Collect and analyze investment portfolio data to monitor investment returns and risk levels.
- Monitor and report country risk in assigned investment geographies.
- Identify high risk investments and propose strategies to mitigate risk.
- Coordinate with Investor Relations team to ensure effective and timely communications of the progress and impact of the investment portfolio.

### Role Responsibility 4: Partnerships and Network

#### Key tasks:

- Build the Emerge Funds reputation as a company committed to excellence in service delivery both internally and externally
- Promote Emerge Fund across networks both locally and internationally
- Maintain strong relations with shareholders, investors, clients and other business partners
- Ensure quality information flow to investors, regulators and other stakeholders as relevant

Person Specification	
<b><i>Education and Certifications</i></b>	Bachelor's degree in Development Economics, Entrepreneurship, Business Administration or related field. Postgraduate in a relevant discipline (MBA or Masters) is highly preferred. Training in financial inclusion, investment analysis, enterprise development or any relevant certification.
<b><i>Essential Experience</i></b>	<ul style="list-style-type: none"> <li>• A minimum of 5 years' experience in Finance/microfinance/ social investment, preferably in Malawi or Sub-Saharan Africa</li> <li>• Experience with screening, due diligence and analysis of potential investees looking to access flexible financing</li> <li>• Experience in climate financing is preferable.</li> <li>• Experience building and/or managing investment and portfolio monitoring systems.</li> <li>• Familiarity with legal documentation common to debt and equity transactions.</li> <li>• Familiarity with foreign exchange currency hedging preferable.</li> <li>• Demonstrated flexibility and success in rapidly changing environments.</li> <li>• Demonstrated ability to design, launch and scale new services and initiatives.</li> <li>• Strong Accounting, Financial Modelling and Economics background.</li> </ul>
<b><i>Essential Knowledge</i></b>	<ul style="list-style-type: none"> <li>• In-depth understanding of equitable approach to investing in emerging enterprises in emerging markets</li> <li>• Sound and up to date knowledge of micro investment concepts, methodologies and techniques</li> <li>• Sound knowledge in the PESTEL analysis of the environment in which Emerge Fund operates in</li> <li>• Thorough understanding of the investment management cycle</li> <li>• Basic knowledge of finance and accounting systems</li> <li>• Strong insight and knowledge of analyzing investments and portfolio enterprise performance</li> </ul>



<b><i>Essential Skills</i></b>	<ul style="list-style-type: none"><li>• Strategic and analytical thinking</li><li>• Strong leadership and management</li><li>• Excellent presentation, communication and negotiation</li><li>• Networking, influencing and relationship building</li><li>• Crisis management and conflict resolution</li><li>• Planning, organisation, time management and coordination</li><li>• Strategic direction and people management</li><li>• Fluency in written and spoken English and native languages</li><li>• Digital savvy (Microsoft packages, Digital marketing tools)</li></ul>
<b><i>Ability</i></b>	<ul style="list-style-type: none"><li>• Able to work with minimal supervision and stay on task</li><li>• Able to work under pressure and under strict deadlines</li><li>• Able to travel frequently</li></ul>
<b><i>Personalities and Attitudes</i></b>	<ul style="list-style-type: none"><li>• Highly motivated</li><li>• A self-starter</li><li>• Creative</li><li>• Positive minded</li><li>• Mature and decisive</li><li>• Diplomatic</li></ul>



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### ***About Emerge Fund***

Emerge Fund is a newly established social impact acceleration fund (microfinance) investing in Malawian early stage and high growth enterprises with financial solutions amplifying their growth and success. Emerge Fund is a subsidiary enterprise under Emerge Livelihoods, a non-profit organisation in Malawi dedicated to amplifying social capital and leveraging technology for economic prosperity of individuals and communities. Emerge Fund is incorporated as a company limited by shares led by Emerge Livelihoods with support from OVO-Entrepreneurs for Entrepreneurs.

Emerge Fund seeks to provide affordable and tailor-made debt financing targeting enterprises contributing to climate adaptation efforts in Malawi and serve as an intermediary for diverse institutions exploring a portfolio of emerging enterprises led by men and women in both rural and urban areas across the country.

Prepared by:	
Line Manager Name and Title:	
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