

STATE OF NEBRASKA CLASS SPECIFICATION  
INVESTMENT SECURITIES ANALYST I

EST: 08/70 - REV: 9/10  
CLASS CODE: G23111

**DESCRIPTION:** Under direct supervision, analyzes securities and investment programs and recommends the purchase and sale of securities regarding the long term fixed income and/or equity security investments; performs related work as assigned.

**DISTINGUISHING CHARACTERISTICS:** (A position is assigned to this class based on the scope and level of work performed as outlined below.)

This is the first classification level of the Investment Securities Analyst series for positions located in the Nebraska Investment Council. This class is considered entry level and the majority of time is spent analyzing and reporting on the performance of a variety of investments. The second level, Investment Securities Analyst II, is distinguished from this level by the added responsibility to recommend sale and purchase of securities and monitoring performance of managed portfolios.

**EXAMPLES OF WORK:** (A position may not be assigned all the duties listed, nor do the listed examples include all the duties that may be assigned.)

Researches and analyzes information regarding industries, companies, economic and market conditions for the purpose of recommending the purchase, holding or sale of securities.

Contacts various institutional and retail brokerage firms, account executives and traders in executing the purchase of sale or securities.

Compiles documentation of transactions made and commissions generated.

Maintains accounting and statistical records to monitor investment performance.

**KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED:** (These are needed at entry level to perform the work assigned.)

Knowledge of: financial instruments and the governments, agencies and companies issuing and guaranteeing them; security quality ratings and the organizations issuing them; economics, investment strategy, industry and company information published by Wall Street firms and by consultants; the securities market and how it operates; variables affecting inflation and the Gross National Product and its relationship to Monetary-Fiscal Policy; different forms of securities and security market behaviors; state and federal laws, policies and standards governing the mission and/or programs of the agency, stock selection, market timing and investment strategy; mechanical and electronic equipment and material used in processing data including computer terminals and packaged computer software; U.S. business economy and other world economics; economic trends and events and the affect on investment securities and accounts; basic financial formulas used in pricing and projecting income securities, economics, financial accounting principles, statistics; the methods and techniques of statistical and financial analysis.

Ability to: interpret corporate financial reports and technical stock charts, communicate with Wall Street industry analysts, corporate management and security traders; interpret data, perform securities analysis, extract performance returns and develop statistical reports; execute securities trading; assess the risk/reward of various securities; communicate to exchange factual information and statistical findings and conclusions; recognize and interpret trends in financial and statistical data, charts, graphs and tables; formulate conclusions based on statistical and financial analysis.

**MINIMUM QUALIFICATIONS:** (Applicants will be screened for possession of these qualifications. Applicants who need accommodation in the selection process should request this in advance.)

Bachelor's degree in finance, economics, statistics, business administration, accounting, or research. Experience may be substituted for education on a year-for-year basis.

**SPECIAL NOTE:**

State agencies are responsible to evaluate each of their positions to determine their individual overtime eligibility status as required by the Fair Labor Standards Act (FLSA).