

Title
Equity Research Analyst

Location
Madison, WI

Classification
Full-Time

Background

Based in Wisconsin's capital city since its founding in 1974, Madison has grown from a local firm into a nationally recognized asset manager entrusted with assets across a suite of mutual funds, managed accounts and customized portfolios. The catalyst for Madison's growth has been a management style that looks beyond short-term trends, emphasizing the performance of investments over full market cycles. Our highly-credentialed portfolio managers, analysts and traders share a belief in high-conviction, risk-conscious investing, and have the autonomy to shape this approach within their own investment teams. For more information, please visit www.madisonadv.com

Position Description

We are seeking a highly motivated Equity Research Analyst to join our team in Madison, Wisconsin. The ideal candidate will have prior experience supporting a senior analyst in covering large-cap stocks. Experience covering Industrials and/or Financials would be helpful. This role is a unique opportunity to contribute to our investment process by providing in-depth, fundamental research. We are looking for someone who is curious, analytical, independent, a strong communicator, and self-motivated, with high integrity.

Duties

- Conduct in-depth fundamental research on large-cap public companies.
- Build and maintain detailed financial models including income statements, balance sheets, cash flow statements, and valuation models (e.g., DCF, comparable company analysis, sum-of-the-parts).
- Generate and recommend new investment ideas by identifying key trends, catalysts, and risks.
- Write detailed research reports and present findings to senior portfolio managers and the investment team.
- Monitor existing investments and update research as new information becomes available.
- Stay current on industry news, regulations, and competitive landscapes to inform research and analysis.
- Collaborate with senior staff from the Investment Management team to support their research needs.

Required Qualifications:

The ideal candidate will possess the following attributes/skills:

- **Bachelor's degree required** in Finance, Economics, Accounting, or a related field.
- **2+ years of relevant experience** as an equity research analyst, preferably covering the Industrial and/or Financial sectors.
- **Relocation to Madison, WI**
- **Advanced proficiency in financial modeling and valuation techniques.**
- **Superior communication skills**, both verbal and written, with the ability to articulate complex financial concepts clearly and concisely.
- **Exceptional analytical and critical thinking skills** with a strong attention to detail.
- **Proven ability to work independently** and manage multiple research projects simultaneously.
- **Strong working knowledge of financial data platforms** such as **Bloomberg**, and **FactSet**.
- **Proficiency in the Microsoft Office suite**, particularly **Excel** and **PowerPoint**.

Compensation is commensurate with experience.

Applicant should submit a cover letter, resume and sample investment or asset allocation thesis to Jobs.Equity@MadisonAdv.com.