



INTELLIGENT RISK.
INFINITE OPPORTUNITY.

Loomis Sayles Credit Research Training Program (CRTP)

The CRTP is targeted at recent college graduates who studied finance, business, accounting, mathematics or economics, with coursework in accounting, corporate finance and financial statement analysis. The research assistant works with a number of senior analysts across several industries on both short- and long-term projects. Such projects include creating and/or updating financial models, creating and/or updating comparable company spreadsheets, compiling and assessing industry data, writing research reports, preparing presentation materials for investment team meetings, among others.

The CRTP is a three-year program with a potential opportunity for an industry team associate position in credit research after the program. The opportunity for an associate position is at management's discretion and depends on both performance and the business need of credit research. This program gives the research assistant solid training in fundamental credit analysis and the relative valuation framework used in our investment process. We believe this program provides a good foundation for an MBA program or other opportunities in investment management.

RESPONSIBILITIES:

- Compile industry and company data in Excel spreadsheets
- Build and maintain financial statement models
- Assist in preparing research memos, industry reviews and presentation materials
- Assist in fundamental industry and company credit analysis with direct supervision from senior analysts
- Develop skills in assessing credit risk, as well as understanding financial markets

SKILLS / QUALIFICATIONS:

- Bachelor's degree with a major or concentration in accounting, finance, business, economics or mathematics
- Solid accounting skills with basic understanding of financial statements and model building in Excel.
- Strong interest in financial analysis and ability to source information and offer new insights
- Solid writing skills and developing presentation skills
- Quick learner; able to work accurately at a rapid pace with competing priorities in a team environment
- Strong organizational and time management skills