

## **Tabula Investment Management Limited (“Tabula”)**

### **COVERAGE ROLE – NORDIC REGION**

(this role is based in the UK)

Tabula is an ETF provider focused on fixed income for European institutional investors.

The company believes that although fundamentals and market dynamics are positive for fixed income, the persistent innovation that ignited the equity ETF market has been lacking in this sector. As a result, the large incumbent funds continue to gather assets, but investors are hungry for new products.

Tabula has a team with many decades of experience in the credit markets

- Infrastructure and control functions provided by Cheyne Capital;
- Fund custody and admin provided by HSBC; and
- Indices developed and supported by IHS Markit

Tabula is using its fixed income expertise to develop better passive exposure:

- Focused on specific risk factors rather than the existing broad benchmarks; and
- Providing precise, practical tools for portfolio construction.

#### **The Role:**

The candidate for the ‘Coverage – Nordic Region’ role will be an entrepreneurial and experienced marketing person to join the Tabula team and assist in building the business. The candidate should have experience of building relationships with pension funds, insurance companies, asset managers, banks and family offices in the Nordic region.

The successful candidate will have 5 to 10 years’ experience and demonstrate an ability to develop a client base in the target geography and client segments. The candidate should value the opportunity to work in an entrepreneurial environment where each team member’s contribution is visible and rewarded.

The dynamic of covering clients for passive products blends elements of buy-side and sell-side sales. The range of products on offer will increase significantly over time. Initially, a relatively small number of clients are likely to provide the majority of the assets invested in the funds. However, over time, the successful candidate will need to continue growing their client base in order to diversify the investor base. A knowledge of fixed income and specifically credit would be helpful, but also a working knowledge of the full range of fixed income exposures and even equity and commodity markets is likely to prove useful. The candidate should also have an understanding of UCITS funds, how they are constructed and maintained. It is important that the candidate is dynamic, flexible, and capable to work in a relatively small team and with a wide range of internal and external stakeholders.

The successful candidate will act with integrity and in a fully compliant manner with respect to regulatory and policy frameworks.

**Principal responsibilities include:**

- Develop a client base in the agreed target client segments;
- Prepare a business plan for covering the client base (to be reviewed with senior management);
- Travel as required to client meetings in the Nordic region;
- Be the key point person for all client and prospect's queries throughout the marketing process;
- Track client activity (meetings, calls, emails) in order to discuss progress toward objectives and need for further resources to achieve agreed outcome;
- Educate clients about Tabula's funds in order to broaden and deepen the Nordic investor base;
- Identify marketing investments required to support the business;
- Review client presentations and stay on top of all new product developments;
- Provide feedback on products with respect to appetite in the target client base;
- Operate within a compliant framework and adhere to corporate and regulatory standards;
- Identify operational hurdles to covering the intended client base; and
- Ad-hoc special projects to support the development of the business.

**The candidate:**

- Experience:
  - A first-class academic background;
  - 5 - 10 years' experience in financial services/asset management;
  - An understanding of fixed income and the ETF space; and
  - Fluent speaker of English and one or more of the Nordic languages.
- Personal Attributes:
  - Strong, clear and precise verbal and written communication skills;
  - Self-driven, quality and results-oriented with an ability to work well under pressure;
  - Strong team player with effective interpersonal skills as required to interact with colleagues across various levels within and outside the firm;
  - Robust lead management, time management and follow-through; and
  - Comfort with handling confidential and sensitive information.