

Research Intern



At R.M. Davis, Research Analysts are aligned by S&P sectors (healthcare, technology, energy, etc.). Working alongside a team of experienced professionals, the Research Intern will gain sector-specific experience that is critical to building a career in Research and will contribute significantly to the in-depth research process that we undertake.

Our Business:

R. M. Davis provides investment management and other wealth management services to its clients. Based in Portland, Maine, the Company has been in business since 1978 and manages \$6+ billion in client assets. For many years, our investment management clients have turned to us for objective, independent financial advice, and a wide range of problem-solving services. Our goal is to simplify clients' lives through a responsive, integrated approach to the accumulation, protection, and transition of their wealth. Over time, we build rewarding long-term relationships, serving as a principal trusted advisor to generations of clients.

Overview:

The Research Intern position is offered to rising sophomore or rising junior undergraduate students. The Research intern will be responsible for conducting general research, writing, reviewing and/or editing company and industry pieces, basic modeling/analysis tasks, and supporting the firm's Research Analysts, Traders, and Client Advisors. Certain responsibilities are conducted regularly (daily, weekly, etc.) while others may be longer-term, ad hoc projects.

Sample responsibilities and projects include:

- Creation of historical financial models and charts using SEC filings, company conference calls, and press releases.
- Conducting basic financial, statistical and industry analysis on specific companies and sectors/industries to support the team's investment thesis.
- Learning fundamentals of industries and companies covered by the team and researching sector trends that may impact company/sector recommendations.
- Writing short notes and reports on covered companies and their respective industry; updating models and spreadsheets; and formatting and editing research documents.
- Utilize research tools (such as Bloomberg, FactSet, Morningstar) to analyze market performance and conduct various industry valuations.
- Undertake an in-depth research project on an assigned industry/sector and present a portfolio recommendation to the Research Department at the conclusion of the internship program.

Qualifications:

Education and Experience

- Progress towards completion of bachelor's degree with demonstrated academic achievement (Overall GPA of 3.2 or higher is preferred).
- Basic knowledge of and a keen interest in finance and economics.
- Demonstrated interest in financial services through prior work experience, student organizations and clubs, academic studies, and/or volunteer work.
- Involvement in extracurricular activities (volunteer work, athletics, campus activities).

Skills and Abilities

Candidates must demonstrate a combination of academic aptitude, quantitative skills, creative thinking, and possess excellent written and verbal communication skills.

- Strong attention to detail; ability to exercise quality control over their own work.
- Client service oriented, with a goal of over delivering to internal and external clients.
- Proficiency with technology operating systems and applications (i.e., MS Outlook, Word, Excel, PowerPoint, and Teams).
- Self-motivated and takes initiative.
- Strong team player with demonstrated collaboration skills.
- A passion and interest in the U.S. and global capital markets, and ability to learn and use a wide range of market data sources (FactSet, Morningstar, Bloomberg, etc.).

Personal traits

- A passion and curiosity appropriate for research work
- Highly motivated with a drive to succeed
- Organized with high attention to detail
- Outgoing with a strong personal presence
- Solid work ethic and integrity

Benefits and Logistics

- Duration: 10-12 weeks (flexible)
- Weekly hours: 40 hours
- Monday – Thursday in office; Friday – remote
- Compensation will be discussed with final candidates

If interested, please send a cover letter and resume to:

**R.M. Davis, Inc.
Attn: Cathy Girr, AVP Marketing & Human Resources
24 City Center
Portland, Maine 04101
cgirr@rmdavis.com**

FLSA Status: Non-exempt
Reports to: CIO or Managing Director, Research

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