



## Hershey Trust Company Position Description

**Position:** Portfolio Analytics Analyst  
**Date:** March 2026  
**Reports To:** Vice President, Investment Operations & Portfolio Analytics

The Hershey Trust Company (“HTC”) helps to advance the legacy and vision of Milton and Catherine Hershey in perpetuity through excellence in asset management and trust administration. HTC’s mission is to enable the Milton Hershey School Trust, The M.S. Hershey Foundation and the Hershey Cemetery Perpetual Care Trust to achieve their long-term goals, by serving with excellence as their Trustee and asset manager. As a trusted and valued partner, we work collaboratively among the group of Hershey entities who collectively preserve and advance the Hershey legacy.

### **General Position Summary:**

The primary focus of the Portfolio Analytics Analyst is to assist the Portfolio Analytics Manager in the gathering of data and use of systems tools to analyze the data. The Analyst ensures the timely and accurate entry of data into information systems to facilitate the preparation of investment performance reporting and underlying portfolio exposures reporting. The Analyst maintains all data warehouses and is responsible for ensuring the integrity of the data. The Analyst prepares both routine and ad hoc data analysis as requested by the investment team and runs quantitative analysis to assist in the due diligence process. The Analyst generates performance attribution reporting and prepares detailed observations stemming from that analysis.

### **Principal Accountabilities:**

- Perform all Caissa daily work, responsible for ensuring the timely and accurate entry of all information into Caissa
- Assist with the preparation of monthly and quarterly performance reporting for all HTC clients, including performance overview reports, IPS compliance checklists, manager performance reports, watchlists, and private markets performance reports.
- Produce periodic reports detailing performance, risk, exposures (such as country, currency, industry, etc), liquidity (including cash needs / management / optimization) and attribution for review and discussion by investment team.
- Research questions about portfolio exposures, positioning, and performance and provide robust answers to “why” investment managers, or asset classes performed the way they did
- Coordinate any investment manager surveys, aggregate the data, and analyze the results
- Maintain all data warehouses, perform monthly data uploads into software systems, etc.
- Respond to ad hoc data analysis requests from the investment team
- Under the supervision of the CEO/CIO, prepare PowerPoint presentations for Board and Committee meetings.



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### **Minimum Qualifications:**

All employees are expected to demonstrate our Core Values of **Teamwork, Integrity, Respect, Impact** through their words and their actions. In addition, this role requires a broad base of business knowledge and subject matter expertise, typically acquired through a combination of education, certification, and prior work experience, as follows:

#### Education and Experience

- Strong academic credentials and base of business knowledge typically acquired through a Bachelors' degree in Finance, Economics, or Accounting.
- One to three years of experience in an institutional setting such as an endowment / foundation, pension plan, consultant, or asset management firm is preferred.

#### Certifications/Designations

- Progress toward/willingness to pursue CFA designation or other relevant certification is preferred.

#### Work Location

- This is a hybrid position with the expectation of being in the office in Hershey, PA two or more days per week (Tuesday, Wednesday, Thursday).

### **Knowledge, Abilities, and Skills:**

- Strong quantitative and qualitative analytical abilities.
- High attention to detail and focus on accuracy. Strong ability to utilize critical thinking to identify potential errors in data.
- Strong verbal/written communication and interpersonal skills.
- Strong operational, systems, and data management skills including but not limited to: Bloomberg, Caissa, analytical software, custodian.
- Unquestioned personal and professional integrity, ethics and reputation with a high level of emotional intelligence, cultural sensitivity and flexibility as well as a strong commitment to excellence and service.
- Works well in a team setting while also self-motivated and independent.
- Ability to prioritize timelines to ensure deadlines are met without sacrificing quality and accuracy.
- Works well in a team setting and is self-motivated to achieve goals and actively supports broader portfolio and Trust Company goals and initiatives.
- Must be motivated by and value the important mission of Milton Hershey School and M.S. Hershey Foundation; and through effective leadership of HTC, and investment management, contribute to the success of their missions.



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**FLSA Classification:** Exempt  
**HTC classification:** Full-time

**Hershey Trust Company is an equal opportunity employer. All aspects of employment including the decision to hire, promote, discipline, or discharge, will be based on merit, competence, performance, and business needs. We do not discriminate on the basis of race, color, religion, marital status, age, national origin, ancestry, physical or mental disability, medical condition, pregnancy, genetic information, gender, sexual orientation, gender identity or expression, veteran status, or any other status protected under federal, state, or local law**