



## SENIOR DATA ANALYST

### Our Group

Puma Capital Group is an award-winning investment manager, and a leading provider of growth capital to UK SMEs and property finance to developers and real estate investors.

### **Our Group Businesses**

The Puma Capital Group comprises four businesses focused on delivering long-term sustainable growth for our investors and partners, namely: Puma Investments, Puma Property Finance, Puma Private Equity and Puma Public Markets. Together they manage more than £950 million in assets, have lent more than £1 billion of development funding, and have assisted dozens of businesses across the UK elevate and build to deliver on their brilliant ideas.

Puma Capital Group has a strong track record in:

- (a) Growth Capital for UK SMEs;
- (b) Property Finance;
- (c) Public Markets.

Puma Investments, one of our Group businesses, raises funds from a variety of sources including wealth managers and IFAs from the very large (e.g. SJP, Barclays Wealth, Tilney, Cazenove) through regional players to the very small independents, from execution-only brokers and from HNWs. We also work with leading wrap platforms (including Fidelity, Standard Life, Ascentric and Transact).

In addition to raising capital from private clients, the Puma Capital Group has attracted £500m of institutional funding.

### Our Products

As a business, our origins lie in the management of Venture Capital Trusts ("VCTs"). In fact, Puma itself grew out of Shore Capital Group which started operating VCTs in 2004. We now have 14 VCTs under our belt and we launched our latest — Puma Alpha VCT — in 2019.

Over the years, we've also branched out into other investments, such as Puma Alpha EIS — our Enterprise Investment Scheme ("EIS") offer, the Puma AIM Inheritance Tax Service — which invests in the Alternative Investment Market ("AIM"), and the Puma Heritage Estate Planning Service — which finances professional property developers.

Indeed, we are proud to have been recognised and awarded for our various offers, most recently having won **Highly Commended: Best Venture Capital Trust** (Investment Life & Pensions Money Facts Awards 2019), **Highly Commended: Best AIM IHT Portfolio Service – Tax-efficient and Estate Planning Specialist** (Investment Week Tax Efficiency



Awards 2018/19) and Finalist/Winner of **Best BR Investment Manager – Listed** for seven years running (Growth Investor Awards, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023).

We take seriously the importance of understanding our clients, investors, markets and our products. Further information about our business can be found on our website [Puma Capital Group](#).

### **Our Business Divisions:**

*Puma Investments*, as set out above, raises funds from a variety of sources including wealth managers and IFAs from the very large (e.g. SJP, Barclays Wealth, Tilney, Cazenove) through regional players to the very small independents, from execution-only brokers and from HNWs. We also work with leading wrap platforms (including Fidelity, Standard Life, Ascentric and Transact).

*Puma Private Equity* is a growth capital investor which partners with UK SMEs. We typically invest £2m to £10m per round into established, high growth businesses. We invest across most sectors with a focus on companies with a proven product and clear growth plan. [www.pumaprivateequity.co.uk](http://www.pumaprivateequity.co.uk)

Our *Puma Property Finance* business delivers development loans from £5 million to £35 million to finance residential, commercial and specialist sector projects such as hotels, student accommodation and healthcare, including care homes and retirement living. We offer three core loan products: stretch senior development loans; pre-development bridge finance for site acquisition; and post-development exit finance. We have also secured an institutional funding line of up to £200 million for deployment in our property finance division. We have completed over £1 billion of loans since inception and continue to grow both our retail and institutional capital sources. <https://pumapropertyfinance.co.uk/>

Our *Puma Public Markets* business focuses on our award-winning Puma AIM IHT Service which is a discretionary portfolio service that seeks to mitigate Inheritance tax by investing in a carefully selected portfolio of AIM listed shares.

### **A business in growth mode**

In the 11 years since we were set up, Puma Capital Group has grown significantly. We are now over 110 people across the Group with our staff working nationally (our head office is in London). In addition, we are also part of the Shore Capital Group which has offices in Edinburgh, London, Liverpool, Guernsey and Berlin.

As such, it is an exceptionally exciting time for our business: combining our already very strong track record with ambitious growth strategies, we have already developed our market share substantially and are looking to build further on our success.



## **Who we are**

The team at Puma are bright, ambitious, and passionate about what we do. Our non-hierarchical and meritocratic approach results in a close-knit team with a unified goal. We believe that success is produced by and belongs to all.

While our team has grown significantly, our values remain the same:

- **Collaboration:** Working together towards the same goal, sharing knowledge and expertise
- **Aspiration:** Striving for excellence in everything we do
- **Respect:** Fostering an environment where everyone behaves with respect and integrity
- **Value Creation:** Delivering outstanding results for our internal and external partners.

These values underpin our business, and they inform every aspect of our behaviour — from how we manage money to the types of companies we support.

We continue to strive towards being a more diverse, equitable and inclusive workplace for everyone with a focus on inclusivity and belonging at all levels for **all** staff. We focus on a number of initiatives including training, our policies and procedures and having a culture that focuses on authenticity for all our team members. We're excited to continue to improve our commitment as allies and create a workplace where everyone is able to bring their whole self to work.

In addition, while it is a given that rewards are highly competitive and based on performance, we also believe in benefits that reward you in a more rounded way; as an example, our team get their birthdays off and personal development grants (for sushi making classes, photography, golf lessons or any interests you have that make you, you).

As well as the standard benefits including an enhanced pension, life assurance, private healthcare etc., other examples of supporting our staff include an enhanced maternity (3-6 months full pay dependant on tenure) and paternity policy as well as fully paid time off for miscarriages and baby loss. We are keen to support our people through various times in their lives from moving house (with paid time off) all the way to key events such as growing their families and menopause. Our team follow a hybrid working model where they are (with their manager) responsible for the days they are in the office or on 'site' (usually three days) and when they work from home.

We also take our responsibilities seriously, actively fundraising for our chosen charity of the year through a variety of activities as well as other socially responsible initiatives including partnering with a number of mentoring schemes where staff are able to support students through their educational journeys.

Our holistic approach to looking after our staff has meant that our staff turnover remains consistently low. And while we don't adopt this approach for the accolades, we are delighted



to have been ranked in the top 100 Great Places to work, Financial Services and Insurance (Small and Medium) and to be certified for the same. Additionally, we have been ranked 70<sup>th</sup> in the UK's Best Workplaces 2024 (Medium category) and 28<sup>th</sup> out of 100 among the UK's Best Workplaces for Development 2024 (Medium category). We were also finalists for the Equity, Diversity and Inclusion Programme of the year and the Mental Health & Wellbeing Programme of the Year in the Inspiring Women Awards run by Property Week.

### **The Role**

An exciting new role has arisen for a Senior Data Analyst, to join our growing business to provide support to our Operations team.

The Senior Data Analyst will have responsibility for optimising the data integrity across systems within the business. The individual will take responsibility for the implementation of data validations, data mapping and application programming interfaces. They will have oversight of the delivery of standardised data reports for stakeholders and assume responsibilities for developing and enhancing data visualisation dashboards. A key part of the role will be to assist with the development of new and existing systems whilst looking for opportunities to streamline, digitise and automate manual processes, to increase inefficiencies within the Fund Operations & Data team and across the wider business.

### **Reports To**

Head of Operations

### **Key Responsibilities**

- Ownership of the data within our CRM system (Microsoft Dynamics), regularly cleansing, validating and reconciling data
- Contribute to the ongoing development of existing systems and the implementation of new systems, ensuring data integrity is maintained across key systems (Exact Libris, CRM, IMiX, Pershing and others)
- Develop and maintain our suite of Power BI reports, ensuring that data is being accurately reported and professionally presented
- Analyse complex datasets to identify trends and enhance data visualisation dashboards
- Ownership of internal and external data reports, collaborating with key stakeholders to streamline and automate reporting processes
- Collaborate with key business stakeholders, to understand their data needs and identify suitable solutions
- Develop data maps and data dictionaries, that support data flows, analysis and reporting requirements
- Develop and own data quality and data governance tools, that monitor, audit and validate the data assets and flows between systems, resolving any integration issues promptly



- Work closely with the IT team, ensuring highest data security standards are in place, data is only accessible to users who need it and business continuity plans are documented and tested for critical data systems
- Provide technical mentorship to junior members of the team and foster a culture of data-driven decision making across the organisation

### **Experience, Skills and attributes required**

- At least 7 years' experience in data analysis within the financial services sector
- Proficiency in data analysis tools and programming languages (SQL/Python)
- Proficiency in using data visualisation tools and creating dashboards (PowerBI)
- Experience with Microsoft Dynamics 365 Suite
- Strong analytical and problem-solving skills, with the ability to analyse large data sets and draw meaningful insights
- Excellent project management skills
- Excellent communication and presentation skills, with the ability to convey complex data analysis to non-technical stakeholders
- Ability to work independently and as part of a team
- Excellent attention to detail, hardworking and organised

### **Importantly:**

Research shows that men typically apply for roles when around 60% of the criteria is met, however, women and other underrepresented people often only apply when they tick every box. So, if you think you have what it takes, but don't necessarily meet every single point on the role description, please do still get in touch – we would love to hear from you!

