



Analyst Spotlight: Grace Gu

In this spotlight, we take a look at what inspires and informs Arnerich Massena Research Analyst Grace Gu; what drew her to this industry, what keeps her here, and the resources she draws on to meet the challenges of her work every day.



What's your role as a research analyst?

As a research analyst, I am responsible for conducting due diligence on existing and potential fund managers. I have meetings with investment managers regularly to discuss portfolios and current economic conditions. I also conduct research about portfolio analysis and asset allocation.

How did you choose this line of work?

I studied mathematics in college. When I started to really think about how I wanted to use my analytical and research skills, the investment industry attracted me the most. That was when I started my CFA journey and landed my current job with Arnerich Massena.

What do you enjoy most about your job?

The part that I enjoy the most about my job is that I have the opportunity to communicate with our very intelligent managers. I can learn so much from their research and views on markets, macro economy, sectors, and individual companies.

Another thing I like about my job is that I believe our office has the best view of Portland. Working while seeing this incredible view is awesome.

What challenges you in your role?

Being creative and innovative is, I believe, a challenge. As a research analyst, I have some freedom to research about any topics that attract me. I want to produce meaningful and innovative ideas either for portfolio management or broad market research.



It can be challenging sometimes since this requires my initiative and there are few boundaries.

What's your go-to source for investment information?

I use Koyfin for daily market news and JP Morgan for weekly and quarterly market overview insights. I also use Morningstar for fund information.

What do you like to do when you are not working?

I like to travel when I'm not working. My favorite places are beaches and forests, and I like to take lots of pictures. I also like to try different restaurants and cuisines. My favorites are seafood and sushi.

How did you land in Portland, Oregon?

I relocated for this job offer and that's why I moved to Portland from Los Angeles.

What was your first job?

My current job with Arnerich Massena as a Research Analyst is my first real job. I'm officially half a year into the industry.

What quote (or book/individual) inspires you?

"The best time to plant a tree was 20 years ago. The second best time is now."

~ Chinese proverb

This quote motivates me that it's never too late to work on and learn anything that interests me.

