

SKILLS FRAMEWORK FOR FINANCIAL SERVICES SKILLS MAP - PRODUCT ORIGATION AND STRUCTURING ANALYST				
<b>Sector</b>	Financial Services			
<b>Track</b>	Sales, After Sales, Distribution and Relationship Management			
<b>Occupation</b>	Product Origination and Structuring Analyst			
<b>Job Role</b>	Product Origination and Structuring Analyst			
<b>Job Role Description</b>	<p>The Product Origination and Structuring Analyst provides assistance and support to create and execute structured product solutions, and gather intelligence for origination pursuits and potential clients. He/She conducts market research to understand the changing needs of the organisation's clients.</p> <p>The Product Origination and Structuring Analyst is a good communicator and possesses strong quantitative, problem-solving and analytical skills to sieve out research and data for product structuring and origination processes. He also performs due diligence and analysis on investment opportunities and the involved counterparties meticulously to manage the organisation's risks.</p> <p>He is required to acquire specific product knowledge and this can include either one or a combination of the following: equity and debt securities, credit and rates, commodities, foreign exchange and structured finance products.</p>			
<b>Critical Work Functions and Key Tasks / Performance Expectations</b>	<b>Critical Work Functions</b>	<b>Key Tasks</b>	<b>Performance Expectations (For legislated / regulated occupations)</b>	
	Construct structured products for clients	Prepare models and materials required for structuring and underwriting processes	If role is scoped to provide advice directly to customers on investment strategies that cover dealings in securities, futures, collective investment schemes, REITs, funds and/or capital markets, Capital Markets and Financial Advisory Services (CMFAS) certification is required. Relevant modules include but are not limited to: 1A, 1B, 2A, 3, 4A, 4B, 5, 6, 6A, 8, 8A, 10	
		Provide support to internal teams to translate clients' needs into existing structured products		
		Compile reports of all stakeholders' needs and product recommendations		
	Evaluate structured product performance	Contact clients to follow up on performance of structured products		
		Compile clients' feedback on structured products		
		Propose adaptations to existing products based on client feedback		
	Support origination process	Gather market intelligence from various channels and sources on new issues, competitors' deals, volume information and valuation benchmarks		
		Conduct market analysis to understand updated trends and prospective clients' needs		
		Prepare pitch books and marketing presentations for origination		
		Review underlying deal documentation		
	Manage risk and regulatory matters	Compile information on developments in relevant laws and regulations		
		Perform due diligence on investment opportunities including market research, risk-based modelling and third-party report analysis		
Work with legal teams to complete required documentation				
<b>Skills and Competencies</b>	<b>Technical Skills and Competencies</b>		<b>Generic Skills and Competencies (Top 5)</b>	
	Account Management	Level 3	Communication	Intermediate
	Behavioural Finance	Level 3	Problem Solving	Intermediate
	Book Building	Level 2	Digital Literacy	Intermediate
	Business Environment Analysis	Level 3	Teamwork	Intermediate
	Capital Expenditure and Investment Evaluation	Level 3	Service Orientation	Intermediate
	Capital Management	Level 4		
	Customer Acceptance Checking and Onboarding	Level 3		
	Customer Experience Management	Level 3		
	Customer Relationship Management	Level 3		
	Deal Syndication and Arrangement	Level 3		
	Environment and Social Governance	Level 3		

Competencies	Ethical Culture	Level 3		
	Financial Analysis	Level 3		
	Financial Modelling	Level 3		
	Financial Statements Review	Level 4		
	Market Research and Analysis	Level 3		
	Price Stabilisation	Level 3		
	Product Advisory	Level 3		
	Product Design and Development	Level 4		
	Product Management	Level 3		
	Product Performance Management	Level 3		
	Regulatory Compliance	Level 3		
	Transaction Documentation for Prospectus Development	Level 3		
<b>Programme Listing</b>	For a list of Training Programmes available for the Financial Services sector, please visit: <a href="http://www.skillsfuture.sg/skills-framework/financial-services">www.skillsfuture.sg/skills-framework/financial-services</a>			

The information contained in this document serves as a guide.