SKILLS FRAMEWORK FOR FINANCIAL SERVICES
SKILLS MAP- CLIENT PORTFOLIO ANALYST

Sector	Financial Services
Track	Product Solutioning and Management
Occupation	Portfolio Manager
Job Role	**Client Portfolio Analyst**
Job Role Description	The Client Portfolio Analyst is responsible for supporting client relationships. He/She also gathers documents and prepares information for presentation to senior team members as well as other relevant stakeholders. He analyses information pertaining to client portfolios to ensure alignment with client objectives. The Client Portfolio Analyst is self-motivated and a team player to deliver quality services to clients. He is able to prioritise his responsibilities to ensure his tasks are completed on time and accurately. He works well under pressure and is able to keep to tight deadlines while maintaining attention to details. The Client Portfolio Analyst is required to acquire specific portfolio management and product knowledge and this can include either one or a combination of: alternatives, derivatives, equity, fixed income, and private equity products.

Critical Work Functions and Key Tasks / Performance Expectations

Critical Work Functions	Key Tasks
Manage client relationships	Assist in gathering documents and information to respond to client enquiries and requests
	Escalate issues relating to client portfolios to ensure resolution
	Support preparation of dedicated investor communications
	Respond to requests from senior team members in preparation for presentations to internal teams
Present information to relevant stakeholders	Gather information for client presentations
	Develop understanding of client portfolio to provide assistance to team members in guiding clients
	Assist in the preparation of product factsheets
	Assist in the preparation of monthly client reporting
Manage investment strategies	Analyse data on investment strategies to share with senior team members
	Track portfolio positioning in order to meet the clients needs
	Assist with portfolio reviews
	Analyse portfolio requirements for potential risks
	Review factsheets and confirm information provided to clients

Skills and Competencies

Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
Account Management	Level 3	Communication	Intermediate
Attribution Analysis	Level 3	Interpersonal Skills	Intermediate
Benchmarking	Level 3	Service Orientation	Intermediate
Business Environment Analysis	Level 3	Decision Making	Intermediate
Client Investment Suitability	Level 3	Problem Solving	Intermediate
Customer Relationship Management	Level 3		
Ethical Culture	Level 3		
Market Profiling	Level 3		
Market Specialisation	Level 3		
Networking	Level 3		
Portfolio and Investment Risk Management	Level 3		
Proposal Management	Level 3		

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	Regulatory Compliance	Level 3		
	Stakeholder Management	Level 4		
	Strategy Planning	Level 4		
Programme Listing	For a list of Training Programmes available for the Financial Services sector, please visit: www.skillsfuture.sg/skills-framework/financial-services			

The information contained in this document serves as a guide.