

SKILLS FRAMEWORK FOR FINANCIAL SERVICES				
SKILLS MAP - PORTFOLIO MANAGER/INVESTMENT MANAGER/FUND MANAGER				
Sector	Financial Services			
Track	Product Solutioning and Management			
Occupation	Portfolio Manager			
Job Role	Portfolio Manager/Investment Manager/Fund Manager			
Job Role Description	<p>The Portfolio Manager/Investment Manager/Fund Manager is responsible for supporting individuals or institutional clients through implementing investment strategies. He/She analyses, creates and manages investment allocations based on clients' needs and risk preferences including their return expectations and market conditions. He maintains close relationships with clients, evaluates performances of pre-determined investment packages and ensures investment packages meet organisational standards and are in compliance with regulatory guidelines.</p> <p>The Portfolio Manager/Investment Manager/Fund Manager manages and works with teams in a highly diverse context. He is diligent and a team player. He possesses robust people and project management skills. He has a growth mindset and is able to work independently and also collaborate with others when necessary. He is able to manage various stakeholders.</p> <p>The Portfolio Manager/Investment Manager/Fund Manager is required to acquire specific portfolio management skills and product knowledge and this can include either one or a combination of: alternatives, derivatives, equity, fixed income, and private equity products.</p>			
Critical Work Functions and Key Tasks / Performance Expectations	Critical Work Functions	Key Tasks		
	Gather and present information to relevant stakeholders	Evaluate research findings on financial forecasting and valuation		
		Develop close working relationships with research units to gather recommendations		
		Present information to relevant stakeholders on performance and risk metrics		
		Meet with investors to determine strategies and goals taking into consideration unique characteristics and profiles		
	Ensure compliance with investment management agreements	Ensure investment portfolios are developed in accordance with latest regulatory standards		
		Maintain information about new regulations and ensure the incorporation of these regulations into portfolio decisions		
		Work with compliance team to keep updated on new regulations		
	Execute strategic decisions and evaluate performance	Monitor financial markets to keep abreast of the most updated information and trends		
		Determine investment mix and rebalance portfolio to fit into the investment strategies		
		Oversee financial analyses and the overall investment processes		
		Oversee financial or operational performance on investments to ensure portfolios meet defined criteria		
Provide recommendations to address gaps in performances				
Skills and Competencies	Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
	Account Management	Level 4	Communication	Advanced
	Attribution Analysis	Level 4	Teamwork	Advanced
	Behavioural Finance	Level 4	Developing People	Advanced
	Business Environment Analysis	Level 4	Leadership	Intermediate
	Client Investment Suitability	Level 3	Problem Solving	Advanced
	Customer Acquisition Management	Level 3		
	Customer Experience Management	Level 3		
	Customer Relationship Management	Level 4		
	Environment and Social Governance	Level 4		
	Ethical Culture	Level 4		
	Market Research and Analysis	Level 4		
Portfolio and Investment Risk Management	Level 4			

	Pricing Strategy	Level 4		
	Project Management	Level 4		
	Regulatory Compliance	Level 4		
	Risk Management	Level 3		
	Trading Management	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.