

SKILLS FRAMEWORK FOR FINANCIAL SERVICES				
SKILLS MAP - PORTFOLIO ANALYST/INVESTMENT ANALYST/FUND MANAGEMENT ASSISTANT				
Sector	Financial Services			
Track	Product Solutioning and Management			
Occupation	Portfolio Manager			
Job Role	Portfolio Analyst/Investment Analyst/Fund Management Assistant			
Job Role Description	<p>The Portfolio Analyst/Investment Analyst/Fund Management Assistant is responsible for providing assistance and support in the development of investment packages for individuals or institutional clients. He/She develops an in-depth understanding of assets or products offered and maintains close relationships with clients in understanding their needs. He assists in tracking product performance and preparing performance reports.</p> <p>The Portfolio Analyst/Investment Analyst/Fund Management Assistant researches and analyses information in a fast-paced environment. He is detail-oriented and hardworking. He possesses good analytical and time management skills, as well as strong presentation skills. He works well with other team members to achieve common goals.</p> <p>The Portfolio Analyst/Investment Analyst/Fund Management Assistant 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.</p>			
Critical Work Functions and Key Tasks / Performance Expectations	Critical Work Functions	Gather and present information to relevant stakeholders	Key Tasks	
			Conduct research on financial forecasting and valuation	
			Gather information from investment briefings for relevant market insights	
			Collate recommendations from research units	
			Identify target individuals or groups for funds to help with new product development and identification of market opportunities	
	Ensure compliance with investment management agreements	Prepare information on performance and risk metrics for relevant stakeholders		
		Assist in developing investment portfolios in accordance with latest regulatory standards		
		Keep abreast of new regulations		
	Execute strategic decisions and evaluate performance	Assist in incorporating new regulations into portfolio management		
		Derive value from the market to maximise investment returns for clients		
Prepare reports on overall performance of investment packages				
Skills and Competencies	Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
	Account Management	Level 3	Communication	Intermediate
	Behavioural Finance	Level 3	Interpersonal Skills	Intermediate
	Business Environment Analysis	Level 3	Problem Solving	Intermediate
	Customer Experience Management	Level 3	Service Orientation	Basic
	Customer Relationship Management	Level 3	Digital Literacy	Intermediate
	Environment and Social Governance	Level 3		
	Ethical Culture	Level 3		
	Market Research and Analysis	Level 3		
	Portfolio and Investment Risk Management	Level 3		
Regulatory Compliance	Level 3			
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.