

Investment Performance Analyst



Subsector: Asset Management

Job Family: Performance Management

Impact Level

Today, this role is responsible for accurate calculation and reporting of portfolio returns, as well as ensuring performance analytics are incorporated and communicated into client presentations as appropriate.

High Impact

Consolidated Activities

	Today	Future
Portfolio Return Calculation	Execution is repetitive and typically rule based. Poor data quality may slow down performance calculations. Hence, asset management firms are driving initiatives to improve data and reduce onerous manual effort.	RPA technology will be leveraged to enable the extraction of data from multiple sources to reduce human errors, validate fund performance or portfolio data, and enable automated report generation and dissemination.
Performance Analytics	As volume increases, completion of attribution analysis can be time consuming.	Technology enabled with Advanced Analytics can enable the deconstruction of excess return to attribute it to the various investment decisions.
Stakeholder Reporting	Execution can be supported by digital platforms/technologies, with the increasing use of visual materials.	The rise of dashboards or digital apps could potentially deliver real-time reporting. Chatbots can also be used to interact with stakeholders and answer simple inquiries with regards to fund performance.
Factsheet Creation	Execution is fairly repetitive and mundane. Many asset management firms have adopted factsheet automation solutions.	Automated solutions will continue to be leveraged for factsheet creation, lightening up the workload and minimising human errors.

In the next

3-5 years ...

The experience and technical knowledge of this role will remain critical to steer/identify causes of excess returns. This role is also expected to provide technical support and guidance for new products and initiatives.

Skills Differentiators:

- ▶ **Automation Management:** The job holder will upskill to oversee automated systems, ensuring that operations requirements are met, and focusing on the continuous improvement of automated solutions.
- ▶ **Process Excellence:** With good understanding of the existing operations, the job holder can help to highlight the root cause of process inefficiencies and identify the right processes for automation.
- ▶ **Complex Problem Solving:** The job holder will need to examine complex cases that are escalated and leverage available resources to develop and execute solutions.
- ▶ **Data Storytelling:** The job holder will display the ability to disseminate key messages/findings in a clear and compelling manner to audiences with varying levels of subject matter understanding.
- ▶ **Influencing and Negotiation:** The job holder will possess the ability to display confidence in presenting and justifying the rationale for recommendations or solutions, and gain buy-in from relevant stakeholders.

