



**Subsector:** Insurance

**Job Family:** Investment Management

**Impact Level**

Today, this role is responsible for developing and managing tactical execution of investment strategies to achieve earnings and growth targets set forth by the business.

Medium Impact

## Consolidated Activities

	Today	Future
<b>Investment Guidelines and Strategy Development</b>	Execution requires expertise on current investment regulations, financial product awareness and strategy planning to help formulate guidelines that align with the strategic development of the organisation.	Advanced Analytics can be leveraged on to help provide insights on financial markets and consumer behaviours for more granular analysis to improve strategic decisions together and minimise potential for losses.
<b>Internal and External Investment Coordination</b>	Execution still requires a high level of human judgment, tapping on communication and management skills, such as the ability to coordinate and collaborate effectively between various tasks and teams to ensure the smooth running and planning of internal and external investments.	This role is likely to still rely on collaborative partnerships between internal and external investment departments to ensure that investment strategies are aligned with the overall direction of the firm. Interpersonal relationship and communication skills will still be key for this role.
<b>Portfolio Management and Analysis</b>	Execution requires strong financial acumen and product knowledge, as well as deep analytical and decision making skills to evaluate and draw insights from the current investment portfolio.	Advanced Analytics and algorithm automation will help to monitor portfolio performance, and provide analysis for current investment performance and structuring potential portfolios.
<b>Investment Strategy Research</b>	Execution requires strong research and investigation skills to conduct insightful research.	Machine learning will help to run “what-if” scenarios on investment strategies, reducing potentially risky decisions. Human judgment will still be required to evaluate whether these risks are significant and/or likely to be detrimental to the firm.

In the next

**3-5** years ...

This role will use Advanced Analytics to help with investment decisions. However, human judgment will still be required to align with strategic investment decisions. Opportunities for automation of portfolio management could facilitate reaching desired targets.

### Skills Differentiators:

- ▶ **Risk Awareness:** Given the infusion of data analytics and automation in decision making processes, the job holder will need to have the ability to evaluate risk and return decisions.
- ▶ **Lateral Thinking:** The job holder needs to possess skills to connect business insights to enhance quality of research findings.
- ▶ **Advanced Digital Acumen/Literacy:** The ability to use and understand available tools will ensure most efficient utilisation to achieve desired outcomes.
- ▶ **Influencing and Negotiation:** Job holders will be required to show ability to persuade stakeholders to rely on information provided by Advanced Analytics.
- ▶ **Complex Problem Solving:** Increasingly complex investment strategies will give rise to new issues that the job holder may not have prior experience dealing with, requiring them to adapt new approaches.



RPA



Advanced Analytics



AI