Portfolio Manager/Advisor

Subsector: Asset Management

Job Family: Investment Management

Impact Level

Today, this role is responsible for portfolio construction, asset allocation and managing client portfolios according to client investment goals and parameters.

Medium Impact

Consolidated Activities

	Today	Future
Client Management	Execution requires strong personal network and relationship building, but can be supported by technology.	Digital applications support job holders in conducting client investment needs assessments (e.g., investment goals, time and risk appetite).
Risk Analysis and Portfolio Construction	Execution requires technical expertise and knowledge, however, technology can help to augment it. Predictive analytics are gradually being used to forecast events and trends in the future based on historical data.	Algorithmic- and analytics solutions are used to streamline the decision-making process through "filtering" investment ideas against defined parameters. Alternative data sources will also further enhance analysis capabilities.
Trades Recommendation	While AI can be used to support the execution of this task, human judgment and deep technical expertise remain critical – i.e., decision to sell or buy – it is not possible for technology to replace it entirely.	The combination of AI and human judgment will continue to play a vital part in execution. Communication with Traders to execute the trades can be enabled through RPA.
Client Materials Development	RPA can enable the extraction of data from multiple data sources and assemble presentation materials and investment proposals into standardised templates. Human intervention will remain essential in personalising the materials for client's unique needs.	RPA combined with human judgment and technical expertise remain critical to offer personalised materials to clients.

In the next **3-5** years ...

Technology will continue to be adopted to support data gathering and improve recommendations. Moving forward, the key differentiator of the role is the technical expertise/judgment that can steer the basis/direction of analysis, ultimately translating into the quality of investment decisions.

Skills Differentiators:

- **Influencing and Negotiation:** The job holder will have the ability to display confidence in presenting and justifying the rationale for the recommendations, and gain buy-in from relevant stakeholders.
- **Lateral Thinking:** The job holder will have ability to look at the 'big picture' and find the linkage between information, ultimately, using these information to evaluate investment recommendations/decisions.
- **Advanced Digital Acumen:** The job holder will gain strong understanding on AI-powered solutions and how technology solutions and its features can be further leveraged/enhanced to support the business.
- **Customer Mindset:** This enables the job holder to tailor recommendations that best meet clients' needs.
- **Risk Awareness:** In-depth knowledge in this area is vital for the job holder to understand any associated risk present in products/recommendations, and be able to judge whether an investment suits the client.

RPA | Advanced Analytics | AI