



Subsector: Asset Management

Job Family: Research

Impact Level

Today, this role responsible for conducting research and providing investment recommendations to investment teams.

Medium Impact

Consolidated Activities

	Today	Future
Primary Research	Execution requires personal networks/relationships and involves soliciting information that is not publicly available.	In the longer-run, advanced AI technologies such as facial recognition may help support the process of and generation of differentiated/alternative interpretations.
Secondary Research	The nature of the task is rule based and document intensive. Traditionally, execution is time consuming.	Advanced Analytics engines can mine unstructured data from non-traditional sources and combine the results with structured data (e.g., earnings data, company reports). Powerful insights could also be drawn through analytics applied to IoT enabled systems.
Valuation and Analysis	Despite being enhanced by technology, technical expertise is required to inform the direction of the analyses.	Predictive analytics, machine learning algorithms and AI are able to automate analysis based on pre-set parameters more efficiently and accurately.
Investment Recommendation Compilation	Execution can be supported by RPA, enabling the extraction of data from multiple sources or databases for information assembly, on the condition that a standardised template is provided.	Despite the automation opportunity, technical expertise and human judgment remain critical to validate and tailor the content.

In the next

3-5 years ...

The efficiency in the data gathering will improve and strengthen analysis by incorporating alternative data sources. Moving forward, this role will leverage analytics coupled with human judgment, experience and foresight to steer the direction and basis of analysis.

Skills Differentiators:

- ▶ **Advisory:** The job holder will display the ability to deliver high quality and value added advices, based on objective interpretation of clients' contexts as well as their needs.
- ▶ **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.
- ▶ **Lateral Thinking:** The job holder will be required to handle larger sets of data, hence, the ability to 'connect-the dots' and stay focused on the big picture.
- ▶ **Advanced Digital Acumen/Literacy:** As banks gradually move away from Excel-based tools, the job holders will be upskilled to be proficient in using advanced statistical analysis software or other tools.
- ▶ **Data Interpretation and Analysis:** The job holder will possess skills to analyse and interpret quantitative and qualitative data.

