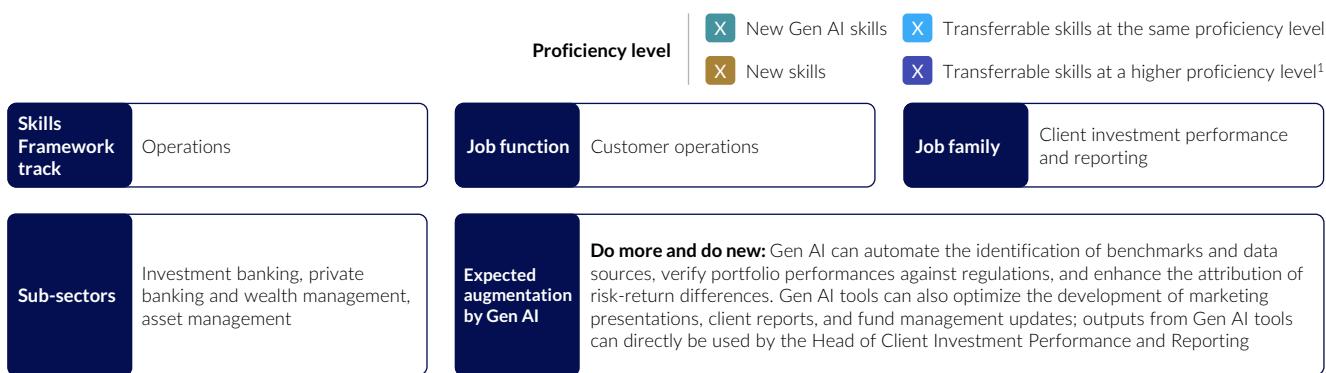


Client investment performance and reporting analyst



Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Gather data for portfolio performance analysis	Identify appropriate benchmarks and data sources for portfolio performance assessment
Analyse portfolio performance	<p>Verify if portfolio performance and risk figures are in accordance with industry regulation and customer investment management agreements, escalating deviations where necessary</p> <p>Attribute differences of risk-return in portfolios and benchmarks by taking into account industry outlook, market factors, and other drivers</p>
Report portfolios' performance	<p>Develop marketing presentations and client reports</p> <p>Prepare daily, weekly, or monthly fund management updates and analyses on portfolio performances</p> <p>Manage customer queries relating to performance analysis and benchmark data</p> <p>Produce performance and portfolio analytics for use in customer reports</p>

New Gen AI skills		Additional skills required for potential redesigned role			
Prompt design	2	Continuous improvement management	3	Taxonomy application	3
Gen AI principles and applications	2	Ethical culture	3	Regulatory risk assessment	3
Ethical and responsible Gen AI adoption	2	Data governance	3	Customer acceptance checking and onboarding	2
Role 1: KYC/Customer due diligence analyst (adj.² Score: 0.55)					
		Regulatory compliance	3	Stakeholder management	3
Role 2: Operations risk and control manager (adj. Score: 0.38)					
		Ethical culture	4	Regulatory and legal advisory	4
		Data governance	4	Monitoring and surveillance	4
		Regulatory compliance	4	Data analytics and computational modeling	4
		Disruption management	5	Operational risk management	4
		People performance management	4	Security governance	4
		Regulatory risk assessment	4	Risk management	4

DO MORE AND DO NEW

1. Transferrable skills with an increase in one level of proficiency is considered easier to acquire than transferable skills with multiple levels of increase in proficiency, followed by net new additional skills. Depending on job redesign for the financial institution, the financial institution will have to pick select skills to reskill employees on, via a combination of on-the-job training and existing courses.

2. Skills adjacency score.

Source: SkillsFuture Skills Framework