

Head of client investment performance and reporting

Proficiency level		
<div> <div></div> New Gen AI skills <div></div> Transferrable skills at the same proficiency level </div> <div> <div></div> New skills <div></div> Transferrable skills at a higher proficiency level¹ </div>		
Skills Framework track Operations	Job function Customer operations	Job family Client investment performance and reporting
Sub-sectors Investment banking, private banking and wealth management, asset management	Expected augmentation by Gen AI <p>Do more: Gen AI can evaluate portfolio performance abnormalities and streamline historical performance calculations, which can help improve the accuracy of risk figures, ensure quality assurance in portfolio valuations, and generate detailed performance analytics and client reports</p>	

Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Gather data for portfolio performance analysis	Evaluate the impact of identified abnormalities on portfolio performance
	Oversee historical portfolio performance calculation processes
Analyse portfolio performance	Lead strategies for selecting valuation techniques and methodologies
	Oversee overall portfolio performance and interpretation of results
	Establish procedures to ensure risk figures are in accordance with industry regulations and customer investment management agreements
	Ensure quality of overall portfolio and benchmark valuations, risk-return calculation methodologies, and synchronization with agreed investment strategies, styles, and objectives
Report portfolios performance	Evaluate overall portfolio performance through daily, weekly, or monthly fund management updates and analyses
	Evaluate portfolios performances and portfolio analytics to be used in customer reports
	Establish strategic positioning of marketing presentations and client reports

New Gen AI skills

Gen AI strategy	5	Gen AI innovation, R&D, and innovation management	5	Prompt design	3
Leading Gen AI-enabled transformations	5	Ethical frameworks for Gen AI	5	Gen AI principles and applications	3
Gen AI data governance	5	Regulatory, legal, and risk management compliance in AI and Gen AI	5		

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.

Source: SkillsFuture Skills Framework