Portfolio analyst/Investment analyst/Fund management assistant

Proficiency level

- X New Gen AI skills
- X New skills
- X Transferrable skills at the same proficiency level
- X Transferrable skills at a higher proficiency level[1]

Skills Framework track	Product solutioning and management
Job function	Customer operations
Job family	Portfolio management
Sub-sectors	Private banking and wealth management, asset management
Expected augmentation by Gen AI	**Do more and do new:** Gen AI can prepare portfolio performance reports, highlight new regulations that require incorporation into portfolio management, and identify market opportunities and gaps in performance. Gen AI tools can generate investment briefs through the synthesis of market data, which can be used by other stakeholders, such as Relationship Managers, in their client development and prospecting outreach

Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Ensure compliance with investment management agreements	Assist in developing investment portfolios in accordance with the latest regulatory standards
	Keep abreast of new regulations
	Assist in incorporating new regulations into portfolio management
Execute strategic decisions and evaluate performance	Prepare reports on overall performance of investment packages
	Identify gaps in performance and notify senior team members
Gather and present information to relevant stakeholders	Gather information from investment briefings for relevant market insights
	Identify target individuals or groups for funds to help with new product development and identification of market opportunities
	Collate recommendations from research units
	Prepare information on performance and risk metrics for relevant stakeholders
	Conduct research on financial forecasting and valuation

New Gen AI skills

Prompt design	2
Gen AI principles and applications	2
Ethical and responsible Gen AI adoption	2

Additional skills required for potential redesigned role

Role 1: Investment counselor assistant (adj[2]. Score: 0.63)

Ethical culture 3	Climate change management 3	Stakeholder management 3
Business environment analysis 3	Customer relationship management 3	Product advisory 3
Market research and analysis 3	Natural capital management 3	Client investment suitability 3
Account management 3	Non-financial-industry sustainability developments 3	Business opportunities development 3
Carbon markets and decarboni-zation strategies management 3	Personal finance advisory 3	Customer acquisition management 3

Role 2: Assistant relationship manager - Private banking (adj. Score: 0.50)

Ethical culture 3	Non-financial-industry sustainability developments 3	Business opportunities development 3
Account management 3	Sustainability stewardship development 3	Cybersecurity 3
Carbon markets and decarboni-zation strategies management 3	Sustainable investment management 3	Business negotiation 3
Climate change management 3	Product advisory 2	Customer acceptance checking and onboarding 3
Customer experience management 3	Service challenges 3	Client investment suitability 3
Customer relationship management 3	Market specialization 3	Stakeholder management 3
Natural capital management 3	Risk management 3	

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