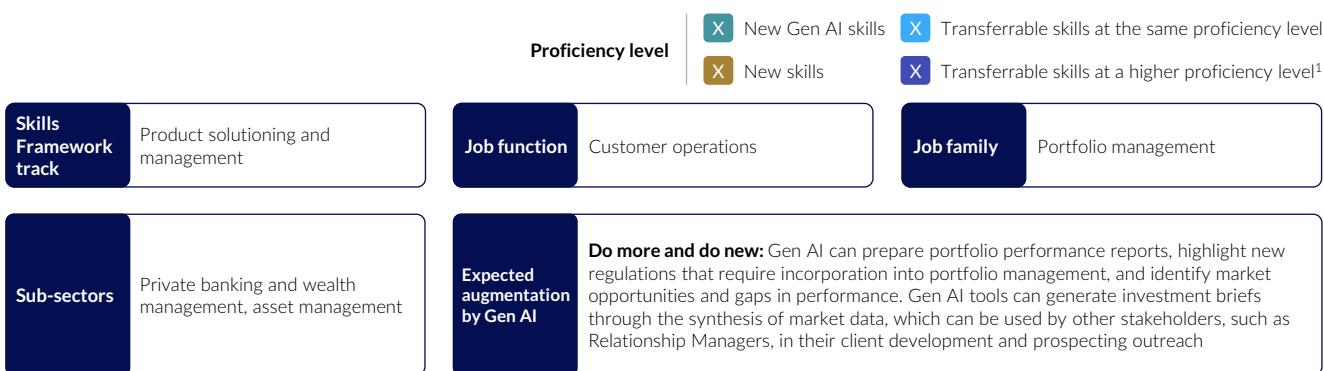


## Portfolio analyst/Investment analyst/Fund management assistant



### 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 <sup>2</sup> . Score: 0.63)				
Ethical culture	3	Climate change management	3	Stakeholder management
Business environment analysis	3	Customer relationship management	3	Product advisory
Market research and analysis	3	Natural capital management	3	Client investment suitability
Account management	3	Non-financial-industry sustainability developments	3	Business opportunities development
Carbon markets and decarbonization strategies management	3	Personal finance advisory	3	Customer acquisition management
Role 2: Assistant relationship manager - Private banking (adj. Score: 0.50)				
Ethical culture	3	Non-financial-industry sustainability developments	3	Business opportunities development
Account management	3	Sustainability stewardship development	3	Cybersecurity
Carbon markets and decarbonization strategies management	3	Sustainable investment management	3	Business negotiation
Climate change management	3	Product advisory	2	Customer acceptance checking and onboarding
Customer experience management	3	Service challenges	3	Client investment suitability
Customer relationship management	3	Market specialization	3	Stakeholder management
Natural capital management	3	Risk management	3	

1. Transferable 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