

## Portfolio manager/Investment manager/Fund manager

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	<b>Do more and do new:</b> Gen AI can optimize the alignment of investment strategies with client expectations and automate the review of portfolio positioning. Gen AI tools can also assess risk profiles, create product factsheets and client reports, and support the preparation of client presentations and investor communications; outputs from Gen AI tools can also be directly used by the Head of Portfolio Management		

### Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Manage investment strategies	Ensure alignment of investment strategies with client expectations Identify investment strategies and review portfolio positioning in order to meet client needs based on agreed-upon guidelines Assess risk profiles to ensure alignment with client expectations and portfolio requirements
Present information to relevant stakeholders	Maintain deep portfolios understanding to provide assurance to clients regarding their portfolio Provide product factsheets to clients Facilitate client reporting, including monthly reports Conduct client presentations to provide them with necessary information prior to onboarding
Manage client relationships	Present investment strategies and capabilities internally to sales, relationship management, and marketing teams Coordinate dedicated investor communications Respond to client inquiries and requests

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

Proficiency level

 New Gen AI skills	 Transferrable skills at the same proficiency level
 New skills	 Transferrable skills at a higher proficiency level <sup>1</sup>

### New Gen AI skills

Prompt design	3
Gen AI principles and applications	3
Ethical and responsible Gen AI adoption	3

### Additional skills required for potential redesigned role

#### Role 1: Investment counselor team lead (adj<sup>2</sup>. Score: 0.49)

Carbon markets & decarbonization strategies management	3	Regulatory compliance	5	Business opportunities development	5
Climate change management	3	Account management	5	Personal finance advisory	5
Natural capital management	3	Client investment suitability	5	Product design and development	5
Non-financial-industry sust. Developments	3	Customer acquisition management	5	Stakeholder management	5
Ethical culture	5	Customer relationship management	5	People performance management	5
Business environment analysis	5	Sustainable investment management	5		
Market research and analysis	5	Product advisory	5		

#### Role 2: Relationship manager - Private banking (adj. Score: 0.46)

Ethical culture	4	Sustainable investment management	3	Service challenges	4
Business environment analysis	4	Client investment suitability	4	Product advisory	4
Account management	4	Customer acquisition management	4	Market specialization	4
Carbon markets and decarbonization strategies management	3	Customer experience management	4	Stakeholder management	4
Climate change management	3	Cybersecurity	3	Customer acceptance checking and onboarding	4
Customer relationship management	4	Philanthropy advisory	3	Business negotiation	4
Natural capital management	3	Business planning	3	Personal finance advisory	4
Portfolio and investment risk management	4	Wealth planning administration	3	Networking	4
Risk management	3	Credit assessment	4		
Sustainability stewardship development	3	Business opportunities development	4		

DO MORE AND DO NEW