Downloaded from <https://www.velvetjobs.com/job-descriptions/associate-portfolio-manager>

# Example of Associate Portfolio Manager Job Description

Our company is growing rapidly and is hiring for an associate portfolio manager. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for associate portfolio manager

* Meeting with internal and external clients
* Participates in transaction underwriting and credit approval issues
* Analyze equity securities for investment purposes
* Monitor investments on a regular basis
* Serve in a global generalist capacity, whereby responsibilities span geographies and industries
* Providing implementation support across all existing funds, including segregated accounts, mutual funds and ETFs
* Analyzing and monitoring portfolio risk, exposure and performance on daily basis
* Following up with Corporate Action & Tax queries for portfolio holdings
* Working with Client Portfolio Managers to deliver periodic client reports, ad-hoc client queries and RFPs
* Working closely with the technology team to enhance our portfolio management systems and infrastructure

## Qualifications for associate portfolio manager

* Strong organizational skills, effective at managing time
* Operations/trading background
* Experience managing passive index funds
* General knowledge of index rebalance rules/strategies
* Knowledge of ETF create/redeem process
* Ability to coordinate with various team for exception processing