



Example of Analyst, Portfolio Job Description

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Our company is looking for an analyst, portfolio. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

Responsibilities for analyst, portfolio

- Perform the initial due diligence and recommendation of third party asset managers, including the qualitative review of the manager's investment management process and the quantitative analysis of performance, asset allocation, and style consistency
- Application Run Cost Transparency
- Application Consumption Transparency
- Track IT Application Baseline Changes, by type of scope change
- 15%) Produce standard monthly and quarterly fund and portfolio level reports, including performance updates, risk statistics, style exposures, and performance attribution
- Driving automation and simplification of data reporting processes and tools sets
- Producing of monthly reporting for senior leaders
- Measuring and analyzing agile fluency across the team
- Producing monthly scorecard metrics
- Developing and analyzing Change Delivery dashboard

Qualifications for analyst, portfolio

- Ability to meet deadlines, prioritizes work, and handle multiple tasks
- Experience as an analyst in a successful IT function handling £100m+ of investment within a complex organization

- Proactive and dynamic in nature
- The role of Portfolio Analyst is responsible for all day-to-day planning, decision making and execution of the Overlay Portfolio Management trading processes for various model portfolios, both externally and internally delivered
- Experience with numerical computing tools such as R, Matlab, Mathematica, Comfortable using these tools for research and model prototyping