



Example of Portfolio Analyst Job Description

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Our company is growing rapidly and is looking for a portfolio analyst. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for portfolio analyst

- Support the portfolio management, product specialist, and RM teams in ad-hoc analytics requests
- Design, prototype, test, document and implement enhancements to calculation methodology for the portfolio analytics system
- Continuously evaluate relevance of portfolio analytics tools and research for the current product mix and market conditions
- Stay on top of economic and market conditions impacting the portfolios
- Conduct requirements analysis and assist with design of portfolio management and modeling tools on the portfolio analytics system
- Determine data requirements for models and calculations
- Testing and validation of applications on the portfolio analytics system
- Primary responsibility for the oversight and administration of client portfolios and the firm's commingled vehicles related to trading activity, cash level monitoring and client guideline review
- Proactively and effectively communicate with Portfolio Managers to ensure that they have the appropriate information relating to the investment decisions of proprietary equity strategies and associated portfolios
- Proactively suggest, lead and participate in value-add projects and process enhancements to improve efficiencies and mitigate risk within the group

Qualifications for portfolio analyst

- Basic understanding of financial instruments such as futures, bonds, swaps,

- Undergraduate degree in finance, business or economics is required
- Solid understanding of capital markets is required
- Ability to work in a team or individual setting is required
- Strong computer skills (Microsoft Office applications) are required