



Example of Portfolio Analyst Job Description

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Our innovative and growing company is hiring for a portfolio analyst. 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 portfolio analyst

- Track and analyze asset and fund information utilizing the group's proprietary databases, facilitating the production of all fund-related analyses and financial reporting
- Proactively highlight and communicate fund and asset-specific issues and opportunities
- Assist with ad hoc projects and analyses as needed
- Communicate with numerous people across virtually all departments of the firm
- Provide support to the Head of Portfolio Management and team, Asset Management, Investor Relations and the CEO / CFO as necessary
- Manages client relationships under the direction of Director of Investments and Portfolio Managers
- Remain abreast of the Global Investment Committee views the asset allocations determined by the Americas Regional Investment Committee
- Provides advice to clients on market conditions
- Making short term technical/investment decisions
- Driving product strategy and longer term strategic business initiatives

Qualifications for portfolio analyst

- Experience in the Investment Management industry and in Compliance
- Minimum of five years of investment industry experience

- BA/BS in finance, economics, or related studies required
- 0 to 2 years of work experience in financial, accounting or investment industries
- CFA Level 1 candidate or higher preferred