



Example of Portfolio Analyst Job Description

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Our growing company is hiring for a portfolio analyst. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

Responsibilities for portfolio analyst

- Support the day-to-day portfolio management and trade processing of various model portfolios through exceptional client service, leadership and execution
- Assist with onboarding internal and external model providers, and interact with providers to ensure accurate and timely model portfolio change processing
- Work with internal and external model providers and other partners to optimize trading process while reducing risk and potential for error
- Performs project cost estimating, scheduling, milestone tracking and reporting
- Implements standard methods for project performance monitoring, reporting, scheduling and estimating
- Provides support to project teams and project managers
- Support wider team members in system best practice
- Accountable for pro-actively supporting common systems
- Work to strict reporting schedules to consolidate project updates and create weekly meeting packs
- Support the development of and distribution of team communications

Qualifications for portfolio analyst

- Series 7 and 63 preferred or obtained within 6 months
- Preparing end-user documentation, summarizing data and composing reports to describe the data

- Will interact with EPMO to indoctrinate enterprise level process changes
- Minimum 5 year experience in data analytics and report generation within an organization of similar size
- Experience working in Technology teams is preference