

JOB DESCRIPTION

Name: Vacant	Role Title: Senior Portfolio Manager – Investment Strategy
Line Manager Name: Dagmar Dvorak	Line Manager Title: Head of Investment Strategy and SAA (HoIS)
SMCR Role: Yes	Certified
People Management Responsibilities:	Yes

Purpose

The role holder will work closely with the Head of Investment Strategy and SAA (HoIS) in building and implementing the SAA advice and Implementation framework and target operating model. The individual will work with stakeholders internally and externally (strategic partner) as well as clients to ensure a successful implementation of London CIV's Fit for the future programme and delivering target performance for clients

Key Responsibilities

- Strategic Asset Allocation Advice**
 Work closely with the HoIS, the commercial team and the external provider to roll out SAA advice to partner funds.
 Independently run SAA advice projects for allocated partner funds.
- Implementation**
 Strive to deliver best in class performance for partner funds.
 Responsible for developing and enhancing existing capabilities putting in place an adequate data and systems framework
 Work closely with external partners to develop the internal cash management process.
 Work closely with the HoIS to produce implementation plans for all partner funds and independently roll them out to allocated partner funds.
 Work closely with the HoIS to develop a roadmap for trading activities with the objective of ensuring Implementation Plans are implemented in a reasonable time period, that all partner funds are treated fairly and the system is not over loaded resulting in errors.
 Ensure the Implement Plans for the partners funds allocated are implemented in line with expectations.
- Client service**
 Develop and maintain good working relationships with stakeholders within and outside the business as well as with allocated partner funds
 Lead on relationships with allocated partner funds attending meetings, answering queries in a timely manner and managing those relationships across all aspects investment and SAA related
 Help develop and maintain client reporting
- Markets and portfolio management**
 Work with the HoIS on tactical asset allocation and developing a London CIV house view
 researching markets and developing market views across a wide range of asset classes

Note: This job description is aimed to be illustrative and is not exhaustive of all the duties and responsibilities which could be contained within this position. The role holder may be asked to undertake other duties and responsibilities which are commensurate with this area of work and grade.

Support the wider team to prepare market commentaries across asset classes tailored to the partner funds' requirements

Produce thought pieces on wider market and macroeconomic issues

- **Organisation and culture**

Help the HoIS build a highly regarded and high performing SAA team

Mentor and develop more junior team members taking on line management responsibilities as the team grows

Prepare ad-hoc market commentaries and help foster the investment culture within the organisation

Proactively lead engagement across Operations, Legal, Compliance, Risk, Commercial, as well as external stakeholders ensuring clear and timely communication. When it comes to high priority projects, proactively act as a bridge between the executive team, stakeholders, and employees, ensuring alignment in objectives, priorities and delivery

- **Leadership**

Business Leadership: Work closely with the Head of Investment Strategy and SAA to help shape the long-term goals and vision for your business area as well as the broader SAA team

Team Leadership: Provide leadership for the less experienced members of the SAA team, setting clear expectations, priorities, and accountability for delivery while supporting development and capability building

People Leadership: Lead and act as a role model to others, inspiring colleagues, help to developing talent, and proactively contribute towards fostering a strong culture

Key Skills and Experience

Essential

- Team player with a “can-do” attitude and willingness to learn
- Willingness to work across teams at London CIV
- Highly experienced in working in asset management across a wide range of asset classes
- Experience in a client interfacing role such as investment consulting
- Analytical skills
- Programming skills
- Presentation skills
- Clear verbal and written skills
- Attention to detail
- Ability to prioritise and work to deadlines
- Self starter
- Ability to project manage small change projects and efforts
- CFA charterholder or equivalent of advantage

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