Job Specification

Job Title: Entry level Portfolio Manager
Division: Investments
Full time / Part time: Full time
Contract type Permanent
Location: Zurich

Rothschild & Co.

Rothschild & Co is one of the world's largest independent financial advisory groups. We offer a distinct perspective that makes a meaningful difference to our clients' business and wealth.

With a team of 3,400 talented financial services specialists on the ground in 40 countries across the world, we provide independent advice on M&A, strategy and financing, as well as investment and wealth management solutions to large institutions, families, individuals and governments. As a family-controlled business that has been at the centre of the world's financial markets for over 200 years, we can rely on an unrivalled network of specialists and are known for our track-record of outstanding execution in financial services.

Rothschild & Co Wealth Management

For over 200 years, Rothschild's freedom to offer objective advice and our commitment to personal service have combined to shape and grow our private clients' wealth, building value for generations. Our dynamic growth and ambitious targets in relation to quality, innovation and reliability have created a need for the above mentioned role.

Click here for more information on Rothschild & Co Wealth Management.

Overview of Role

To strengthen the Portfolio Management team in terms of implementation of investment strategy in client portfolios. The successful candidate should be an investment professional with 1 - 2 years of experience in banking / portfolio management. The main task will be the implementation and management of our standard discretionary mandates. Further tasks will include the preparation of standard investment proposals, pitching activities and portfolio reports.

Responsibilities

- Timely, efficient and accurate implementation of the given investment strategy in client portfolios
- Responsible for the day to day management of the on-model portfolios

- Ensuring client portfolios stay on model (within guidelines)
- Maintaining and developing an efficient platform that enables high quality implementation
- Monitoring operational risk
- Creation of standard and special investment proposals
- Coordination of information sharing within PM and Investment Department and operational support of the discretionary investment process
- Preparation of standard client reporting

- **Education and Qualifications**
- High school diploma with banking background or University degree

Experience, Skills and Competencies Required

- 1 - 2 years relevant experience in the respective investment area
- Good generalist knowledge of all asset classes and financial instruments
- Avaloq System knowledge is an advantage
- Excellent Excel, VBA knowledge
- Commitment to excellence, business drive, ‘can do’ attitude; flexibility, high quality standards
- Fluent in English
- Team player, ethical attitude
- Excellent communication skills

If you are curious to learn more about us and have valuable experiences in a similar role, then please submit your CV and Cover Letter through our recruitment tool.