



Technical Recruitment Demystified

A PRIMER SERIES FOR NEW TECH RECRUITERS

Understanding the
role of a ...

**PORTFOLIO
MANAGER**

by

AYUB SHAIKH

CEO HOLISTICA CONSULTING





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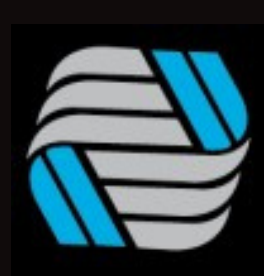
DEFINING THE **ROLE**

A Portfolio Manager optimizes investment portfolios by developing strategies, allocating assets, and balancing risk and return objectives. They monitor markets, analyze opportunities, and communicate with clients, ensuring alignment with financial goals.



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KEY TECHNICAL SKILLS

- Analyze financials, build models, and diversify like a pro to optimize returns while managing risk.
- Master risk metrics, leverage tech tools, and use data-driven insights to anticipate and manage portfolio threats.
- Navigate regulations, interpret reports, and track performance with transparency and responsibility.



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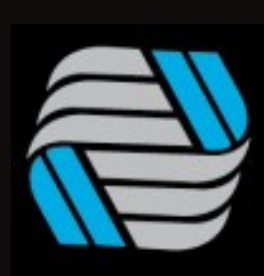
KEY SOFT **SKILLS**

- Ability to clearly articulate investment strategies and market insights while fostering strong client and stakeholder relationships.
- Ability to build trust and collaboration with clients, colleagues, and industry professionals.
- Ability to tailor strategies to meet client needs and cultivate long-term relationships.



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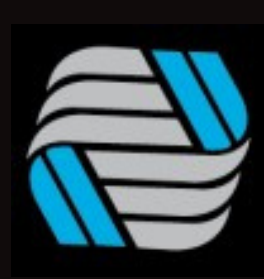
TOOLS USED

- Using platforms like Bloomberg Terminal, FactSet, Morningstar Direct, and Thomson Reuters Eikon for real-time data and analysis.
- Executing trades seamlessly through platforms like Charles Schwab, E*TRADE, TD Ameritrade, and Interactive Brokers.
- Utilizing software such as RiskMetrics, Axioma, and MSCI Barra to assess and mitigate portfolio risks.



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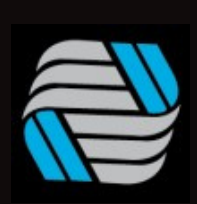
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QUALIFICATIONS AND CERTIFICATIONS

- Bachelor's degree in finance or related field, with optional advanced degrees like MBA or MFin.
- CFA and specialized certifications based on focus (e.g., CAIA, FRM, CIMA).
- Ongoing education through workshops and progressive industry experience.



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**THE TRAINING TO TRANSFORM
YOUR NORMAL RECRUITERS
INTO**

**WORLD-CLASS
TECHNICAL
RECRUITERS**

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