

PR/097867 | Wealth Management (Portfolio Management), Executive Officer

Job Information

Recruiter
JAC Recruitment Singapore

Job ID
1621679

Industry
Other (Recruitment Services)

Job Type
Permanent Full-time

Location
Hong Kong

Salary
Negotiable, based on experience

Refreshed
November 10th, 2026 10:38

General Requirements

Minimum Experience Level
Over 6 years

Career Level
Mid Career

Minimum English Level
Fluent Level

Minimum Japanese Level
None

Minimum Education Level
Associate Degree/Diploma

Visa Status
No permission to work in Japan required

Job Description

About the Opportunity
Our client, a leading digital banking platform, is seeking an experienced investment professional to drive the development and management of investment solutions for its wealth management business. This role will be responsible for portfolio management, investment research, product governance, risk oversight, and strategic investment initiatives aimed at delivering strong client outcomes.

Key Responsibilities

- Lead the development and management of investment strategies, model portfolios, and discretionary investment solutions offered through the bank's wealth platform.
- Drive asset allocation decisions, portfolio construction, and ongoing portfolio monitoring across a range of investment products and asset classes.
- Conduct comprehensive research on global markets, economic trends, sectors, and investment opportunities to support investment recommendations.
- Develop actionable investment insights and portfolio strategies based on market analysis and client needs.

- Oversee portfolio implementation, ensuring adherence to investment guidelines, risk frameworks, and regulatory requirements.
- Monitor portfolio performance, market developments, and emerging risks, recommending tactical and strategic adjustments where appropriate.
- Establish and enhance investment governance, risk management, operational controls, and oversight processes.
- Partner closely with Product, Risk, Compliance, Technology, Operations, and Distribution teams to deliver investment solutions and digital wealth capabilities.
- Prepare investment committee materials, management reports, and market commentary for internal and external stakeholders.
- Support regulatory engagement, audits, and governance reviews relating to investment and wealth management activities.
- Provide thought leadership on investment markets and contribute to client education, internal training, and investment content initiatives.

Requirements

- Minimum 5 years of experience in portfolio management, discretionary investments, wealth management, private banking, asset management, or investment advisory.
- Proven experience managing investment portfolios, model portfolios, multi-asset solutions, or managed accounts.
- Prior experience within a digital bank, private bank, retail bank, wealth platform, asset manager, securities firm, or investment management business would be highly advantageous.
- Strong understanding of investment products including equities, fixed income, funds, ETFs, alternatives, and structured investment solutions.
- Sound knowledge of portfolio construction, asset allocation, investment risk management, and performance attribution.
- Familiarity with regulatory and governance requirements applicable to investment and wealth management businesses.
- Proficiency in investment analytics and market data platforms such as Bloomberg, FactSet, Morningstar Direct, or equivalent tools.
- Strong analytical, communication, and stakeholder management skills.
- Demonstrated ability to work cross-functionally in a fast-paced, technology-driven environment.
- Experience managing or mentoring team members is preferred.
- Fluency in English is essential; additional Asian language capabilities would be advantageous.

Why Join?

- Opportunity to shape and scale the investment offering of a fast-growing digital banking platform.
- High visibility role with direct exposure to senior leadership and business strategy.
- Blend of investment management, product innovation, and digital wealth transformation.
- Collaborative, forward-thinking, and technology-enabled working environment.
- Competitive compensation package with performance-linked incentives.

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Company Description