नेपाल धितोपत्र बोर्डबाट मर्चेन्ट बैंकरको रुपमा कार्य गर्न अनुमतिपत्र प्राप्त संस्था

गरिमा क्यापिटल लिमिटेड

GARIMA CAPITAL LIMITED

(A Subsidiary of GARIMA BIKAS BANK LIMITED)

समृद्धिको सारथी

TERMS OF REFERENCE

Functional Title: Portfolio Manager

Corporate Position: Senior Officer/Officer

Required No: 1

Garima Capital Limited is a Merchant Banker, licensed by Securities Board of Nepal (SEBON) to render 'Portfolio Management Services' (PMS). It has also obtained Depositary Participant License from CDS & Clearing Ltd. to render DP Services. Company is on the verge of obtaining full-fledged Merchant Banking License including Mutual Fund Manager License. The Company is located at Kamal Pokhari Ward - 01, Kathmandu, Nepal.

Our core team comprises of qualified finance professionals which shall enable us to provide prompt and thorough service to our valued Clients. We encourage an open and collaborative working environment in which everyone has the opportunity to deliver her or his best. We foster professionalism, excellence, cooperation among our employees and high standards of business ethics.

Position Summary:

The position holder is responsible to take both direction and work intuitively to maintain a favorable public image of the Company. The work area includes Investment Management Department PMS Unit where the position holder shall be involved in managing PMS unit.

We are looking for an experienced portfolio manager to create and manage investment portfolios for our clients. Responsibilities will include crafting investment packages, managing client expectations, handling transactions, and achieving our clients' overall investment objectives.

To be successful as a portfolio manager you must be able to work efficiently and effectively in a collaborative and fast-paced environment. Candidate should have experience in the financial services or investment sectors, and should focus on providing portfolio recommendations to our clients based on in-depth financial market analysis.

This position reports directly to the Head of Investment Management Department.

Duties and Responsibilities:

The duties and responsibilities of a ***Portfolio Manager*** includes:

- Generate an investment policy statement and outline clients' investment objectives.

- Construct successful investment portfolios in line with market conditions and economic trends.
- Buy and sell of securities on behalf of clients to maintain a specific investment strategy, or to reach an investment objective.
- Determine acceptable risk levels for clients based on time frames, risk preferences, return expectations, and market conditions.
- Develop knowledge on client’s investment goal and structure goal-based investment plan to cater their needs.
- Maintain new and existing client relationships, including informing clients of market conditions, updating them on investment research and economic trends, and meeting with them to discuss their portfolio performance and investment objectives.
- Evaluate the performance of investment portfolios and ensure compliance with standards provided by regulatory organizations, including conformance with investor disclosures, privacy laws, anti-money laundering requirements, and anti-fraud measures.
- Prospect new clients.
- Stay up to date with relevant investment and trading news, and economic trends.
- Implement investment plans.
- Create reports on investment performance and activity.
- Monitor portfolio performance versus benchmarks and develop insights for clients regarding key contributors and detractors.
- Monitor asset allocation on a periodic basis relative to policy and goals; evaluate need to rebalance.
- Work together with investment research teams to identify investment opportunities.
- Keep her/himself updated with trends in the industry and frequently provide constructive suggestions to immediate supervisor to improve company's image.
- Monitor daily tasks/duties of subordinates in productive and efficient manner.
- Adhere to Company's PMS Standard Operating Procedures (SOP).
- Any other work assigned by senior officials.

Qualification and Experience:

- MBA or equivalent. Master’s degree with minimum first division or CGPA 3.30 or above on scale of 4.
- At least 2 years of experience in investment (asset) management.
- Age not exceeding 40 years.

Required Skills and Attributes:

- Strong analytical, Problem-Solving and Decision-Making Skills.
- Strong Fundamental and Technical analysis skill.
- Detailed understanding of capital markets.
- Highly interested and enthusiastic about economic and financial market trends.
- Flexible to travel to meet clients as required.
- Able to work even under stretched hours.
- A flair for statistics and data manipulation.
- Confident presentation abilities.
- Ability to foster teamwork and motivate colleagues.
- Client-centered focus.
- Good communication and interpersonal skills.

- Dealing capacity with different nature of Client(s) and focused towards meeting client(s) goal.
- Ability to work under stress circumstances.
- Leadership and team work.
- Strong Work Ethics and Positive attitude.
- Strong understanding of investment strategies and risk management.
- Punctual and Motivated.
- Detail-oriented, organized, and comfortable making serious decisions for others.

Salary and Benefits:

As per Company's Policy.

How to apply:

Interested candidates are requested to send their formal application to recruitment@garimacapital.com by **12th September, 2022 (27th Bhadra, 2079)** before 17:00 hours.

Selected Candidates are required to attend interview. The company retains the right to reject one or all applications without assigning any reason whatsoever.