

VACANCY

Assistant Portfolio Manager

Core Wealth, a Category II FSCA-licensed Discretionary Fund Manager (DFM), is a respected and trusted boutique wealth management firm. We provide discretionary investment management and independent financial advisory services to individuals and corporates. We are currently offering an exciting opportunity for an Assistant Portfolio Manager to join our dynamic, value-driven investment division.

KEY RESPONSIBILITIES

As part of our investment division, you will support both the advisory and portfolio management teams. The ideal candidate will have a solid academic foundation in investments, a passion for financial markets, and a proactive, research-driven mindset. Key responsibilities include:

- Conduct in-depth research and analysis on local and global markets, asset classes, and investment products.
- Present investment insights and materials to financial advisors and assist with client proposals and queries.
- Support the management and oversight of 15+ model portfolios across our DFM range.
- Contribute to the development of investment strategies and model portfolio recommendations.
- Assist in ongoing portfolio monitoring, reporting, and risk analytics.
- Prepare investment commentary, presentations, and reports for internal and client-facing use.
- Contribute to thought leadership content and participate in client engagement initiatives.
- Perform ad hoc investment-related task as required.

MINIMUM REQUIREMENTS

- Bachelor of Commerce (BCom) degree in Investments, Economics, Financial Risk Management, or Financial Accounting.
- Successfully passed CFA Level II.
- Minimum of 3 years' investment-related experience.
- Strong analytical ability and a keen attention to detail.
- Demonstrated interest in portfolio construction, financial markets, and investment research.
- Excellent written and verbal communication skills.
- Above-average proficiency in MS Excel.

ADVANTAGEOUS

- Passed or enrolled for CFA Level III.
- Programming or coding skills (e.g., SQL, Python, VBA).
- Prior experience working at a DFM or multi-manager.

APPLICATION DETAILS

Please submit your CV, academic transcripts, a brief motivation letter, and at least three (3) contactable references to vacancies@corewealth.co.za with the subject line: Asst. PM Application – [Your Name]. **Closing Date for Applications: 30 May 2025**

Core Wealth is an equal opportunity employer. We thank all applicants for their interest; however, only shortlisted candidates will be contacted.

