Portfolio Manager – Multi Assets

Experience level : Senior
Entity : Bank Syz
Office : Geneva

Manage discretionary portfolios (standard and special) for the Bank's client base and provide investment proposals to prospects, clients and Relationship Managers (RMs), with the objective of delivering agreed goals within the overall framework of the Wealth Management operating model and business strategy. Contribute actively to the overall investment process and help deliver a first-class investment experience for clients.

Key responsibilities

- Construct high-quality, performance-oriented portfolios and implement Investment Strategy decisions across asset classes.
- Oversee multi-asset discretionary mandates across reference currencies and risk profiles, while adhering to internal rules, regulatory constraints, and client restrictions.
- Be responsible for the day-to-day management and implementation of discretionary client portfolios, including rebalancing strategy across portfolios when necessary, following the Investment Committee decisions.
- Ensure that portfolios are aligned with client objectives and restrictions, with transparent reporting on asset allocation, performance, and portfolio risk.
- Manage standard and special mandates and select appropriate instruments across equities, fixed income, funds, structured products, and other approved investment solutions.
- Stay actively aware of developments in macro trends and market drivers, and translate investment views into portfolio actions and client proposals.
- Participate in regular investment research meetings, collaborating with colleagues in the investment team to discuss market events, allocation views, and implementation, and by contributing portfolio insights, thematic ideas, and product opportunities across asset classes.
- Support the organization and ongoing improvement of the Discretionary Portfolio Management team's operational setup, risk & performance management framework, and tool platform dedicated to reporting and proposal formulation.
- Proactively liaise and collaborate with Relationship Managers and investment advisors, supporting them in identifying opportunities to convert advisory and execution-only relationships into discretionary mandates.
- Prepare marketing documents, portfolio reviews, commentaries, and investment proposals to support client retention and asset acquisition.
- Participate in client and prospect meetings, present portfolio strategy and performance, and contribute to review and client retention meetings where required.
- Build effective and trusted relationships with internal and external clients, ensuring that the client viewpoint remains central to investment decisions.
- Contribute to the continuous development of the Bank's investment offering, including portfolio construction, risk management enhancements, and discretionary investment solutions.
- Manage restrictions and mandate parameters in the Bank's portfolio management systems, including G2 where applicable.

Your profile

- Minimum of 8 years of experience in multi-asset portfolio management or investment advisory, with significant exposure to discretionary multi-asset portfolios.
- Proven track record of successfully managing diversified portfolios and delivering high-quality investment service to clients.
- Strong analytical skills with a deep understanding of asset allocation, portfolio construction, and cross-asset markets.
- Demonstrated in-depth knowledge of financial instruments and the ability to build tailored portfolios based on client mandates and investment constraints.
- Demonstrated ability to communicate effectively with private clients and internal stakeholders in a business development context.

Technical skills:

- Ability to clearly articulate and pitch technical investment concepts across asset classes.
- Capability to take timely and well-reasoned investment decisions, balancing fact-based analysis with judgment, information, and experience.
- Strong portfolio construction skills and process-driven implementation mindset.
- Ability to acquire, synthesize, and share information and skills efficiently.
- Strong team player with willingness to collaborate across the organization.
- Strong IT skills (Microsoft Office) and solid knowledge of Bloomberg, FactSet, VBA, Python and portfolio management systems.
- Prior experience with G2 is an advantage.

Soft skills:

- Must possess a high standard of professionalism and integrity.
- Pragmatic, result-oriented, and client-focused.
- Strategic thinker with sound decision-making ability.
- Excellent communication skills allowing effective collaboration with internal and external partners.
- Self-motivated, proactive, adaptable, and able to work independently in a fast-paced environment.
- High attention to detail, intellectual curiosity, and a hands-on approach.
- Creative and entrepreneurial mindset, combined with strong team spirit and initiative.

Education:

- Master's Degree, CFA, or CFA equivalent

Languages:

Fluent English and French, with the ability to communicate effectively with clients and internal stakeholders. German or Swiss German would be a strong advantage.

Swiss Residence requirements – Yes.

The role requires the ability to travel on a regular basis to the Bank's Zürich office.