

Title	Evaluate portfolio performance to ensure meeting of pre-defined investment objectives
Code	106882L6
Range	Evaluating portfolio performance against pre-defined investment objectives. This applies to portfolio with different natures, products and sizes across different segments of private banking clients.
Level	6
Credit	5 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Develop approach in performance evaluation <p>Be able to:</p> <ul style="list-style-type: none"> • Demonstrate specialized knowledge in investment and portfolio management in order to select the appropriate measurement tools / indicators to evaluate performance • Evaluate the investment objectives of clients in order to select the appropriate measurement tools / indicators to evaluate performance 2. Measure portfolio performance <p>Be able to:</p> <ul style="list-style-type: none"> • Track performance of the investments regularly and during different market conditions in order to provide a reliable measurement of the performance • Calculate the return on investment taking into consideration the values of different assets, transaction fees, and other related costs • Compare the investment return against the pre-defined objectives and other relevant benchmark / evaluation standards 3. Identify improvement measures <p>Be able to:</p> <ul style="list-style-type: none"> • Monitor trade records to review whether the investment strategies are followed and amount of risks took • Review overall investment strategies as well as strategies in different asset classes to identify opportunities to improve investment returns • Discuss with clients about the market developments and provide advice on how their portfolios can be aligned
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Evaluation on portfolio performance and identification of improvement measures. This should be based on analysis on the changes in portfolio performance and comparison with other investment products, etc.
Remark	