Unit of Competency

Functional Area: Operational Support & Services

Title	Advise on investment portfolio management
Code	105684L5
Range	This unit of competency is applicable to those who are responsible for advising investment portfolio management. It involves analyzing social and economical records, developing overall investment strategies, developing appropriate investment structures and advising feasibility for investment managers on customer portfolios.
Level	5
Credit	3 (for reference only)
Competency	Performance Requirements 1. Possess knowledge in economics, statistics, and financial theories • Familiarize with insurance market • Comprehend company's product terms and features • Comprehend corporate profitability strategy • Fully aware of relevant regulatory requirements on risk exposure, reserve and liquidity 2. Advise on investment portfolio management • Analyze social and economical records • Apply statistical modeling to develop overall investment strategies • Develop suitable investment structures to accommodate individual customers' risk appetite • Summarize portfolio statuses for customers' accounts • Produce reports for investment managers • Advise the feasibility of customer portfolios for investment managers 3. Ensure customer investment portfolios are appropriately managed to accommodate their risk appetites • Identify effective investment structures for customer investment portfolio management • Ensure investment managers fully understand the feasibility of customer portfolios.
Assessment Criteria	The integrated outcome requirements of this unit of competency are: • Able to develop investment structures and strategies to accommodate customers' risk appetites • Able to advise the feasibility of customer portfolios.
Remark	