

FUTUREGROWTH ASSET MANAGEMENT IS RECRUITING!

We have an exciting opportunity available for a **Portfolio Guidelines Specialist** in our team.

Futuregrowth is committed to transformation. A strong preference will be given to suitably qualified previously disadvantaged candidates.

Portfolio Guidelines Specialist

Are you passionate about investment operations, portfolio oversight and regulatory compliance? This role sits at the intersection of operational rigour and compliance assurance, supporting the integrity of client portfolios and the investment process.

Who is Futuregrowth?

Futuregrowth has been South Africa's leading developmental, responsible and fixed-income investor for over 25 years. We manage a range of fixed interest and development funds and play a key leadership role in the South African asset management industry. We are committed to investing our clients' funds in a responsible manner, with the interests of our clients always coming first.

Purpose of the position

A vacancy has arisen for a Portfolio Guidelines Specialist. The individual will play a key role in supporting operational and compliance processes across client portfolios, contributing to the accuracy, efficiency, and integrity of the investment management function.

Key responsibilities of the position

The successful candidate will fulfil the following primary functions:

- Reviewing, interpreting and operationalising client investment mandates, ensuring guidelines and restrictions are accurately captured and maintained;
- Monitoring portfolio rules against mandate guidelines and related requirements, supporting the development and testing of automated and manual oversight processes;
- Supporting the coding and configuration of compliance rules within the automated compliance and order management system (CRIMS and equivalent platforms), ensuring alignment with mandate terms and applicable regulations;
- Quality-checking and peer reviewing coded rules to ensure accuracy and completeness;
- Engaging with portfolio managers, traders and operations staff to evaluate and resolve pre- and post-trade queries and breaches;
- Supporting instrument classification, static data integrity, and security master governance across relevant systems;

- Proactively identifying opportunities to improve and automate processes, contributing to a culture of continuous improvement;
- Compiling operational and monitoring reports for internal stakeholders, portfolio managers, and clients where required;
- Participating in operational and compliance meetings, contributing to issue resolution and process discussions;
- Addressing ad hoc queries from portfolio management, operations, and client-facing teams relating to compliance, mandate interpretation, and operational processes; and
- Navigating and extracting information from back-office and portfolio administration systems to investigate non-adherence incidents and operational exceptions.

Knowledge and experience required

Skills, professional qualifications and experience:

- Bachelor's Degree, preferably BCom.
- A minimum of 2–3 years' relevant working experience within an investment or asset management business, with knowledge of fixed income instruments and portfolio administration.
- Experience with CRIMS, HiPortfolio, Charles River or similar role and portfolio management systems will be highly advantageous.
- Computer literacy across the Microsoft suite; exposure to investment administration systems and data tools will be an advantage.

Key behaviours and competencies:

- Analytical and critical thinking with a problem-solving mindset.
- Excellent communication skills (both written and verbal).
- Strong interpersonal approach.
- Team-orientated with a willingness to learn and adapt.
- Quality focus and strong attention to detail.
- Ability to work independently and as part of a team.
- Takes responsibility for quality of work and output.
- Pro-active can-do approach.
- Multi-tasking and time management skills given business needs.
- Ability to deliver under pressure.

Recruitment process

Selected candidates will need to attend a series of competency-based interviews/ activities and a psychometric assessment.

Application Link

[Click here to apply](https://bit.ly/4mhoraZ) (https://bit.ly/4mhoraZ)