CANDRIAM
A NEW YORK LIFE INVESTMENTS COMPANY

Business Unit

Investment Management

Job Title

Client Portfolio Manager

Mission

The ESG Client Portfolio Management Team is seeking an experienced ESG CPM/Product Specialist to support sales teams in their client interactions and to broaden Candriam's communication on ESG topics with the outside world.

The role reports directly to the Head of ESG Development and requires a good mix of client facing experience and ESG know-how. The CPM Team delivers Candriam's unique approach to ESG to clients across Europe, through video meetings as well as face-to-face meetings.

The successful candidate's main focus will be the UK and US markets. She/he will have native English communication skills, both orally and written. She / he will bring experience in a fast-paced client-facing environment, delivering ESG content to investors, providing colour on ongoing ESG-related developments across a range of categories, including regulatory and firm-specific topics, and creating effective presentations and marketing packages.

OU BIEN

The Client Portfolio Manager is an investment expert, and a key part in the recognition of Candriam and the business unit as pioneers in their fields of expertise. Absolute Return and Quant Equity manages more than 10 billion euros in assets and needs a CPM to support with marketing materials and communicate internally / externally on the strategies implemented. The Client Portfolio Manager contributes to the communication with Candriam's sales teams and with end-clients, if necessary during client meetings assisting the sales team.

OU BIEN

The ESG CPM main role is to accommodate our growing sustainability business, to reinforce our commercial efforts and reach, and to assist in addressing sales and client requests.

Responsibilities

Au sein de l'unité opérationnelle UHNW Advisory, vous assumerez les responsabilités suivantes:

- ✓ Développer et cultiver une compréhension et une complicité avec les clients UHNW en fonction des attentes sont expériences et son profil de gestion.
- ✓ Contribuer aux compétences de l'équipe
- ✓ Apporter un éclairage complémentaire sur des zones de compétences spécifiques.
- ✓ Construire et gérer des portefeuilles de clients privés.
- ✓ Appliquer la stratégie de CANDRIAM à tous les portefeuilles concernés dont vous avez la responsabilité au niveau local.
- ✓ S'assurer que tous les portefeuilles dont vous avez la responsabilité directe (ou en back-up) sont conformes à la stratégie.
- ✓ Veiller à ce que les mandats des clients soient bien documentés et gérés de façon éthique, dans le respect des contraintes spécifiques des différents mandats.
- ✓ Garantir la continuité des activités en toutes circonstances.
- ✓ Fournir un appui technique et commercial aux Private Bankers de Belfius ainsi qu'aux fonctions commerciales et marketing afin de les aider à décrocher de nouveaux mandats auprès de clients privés.
- ✓ Assurer la communication et le reporting spécifique concernant la performance du portefeuille et la stratégie d'investissement aux clients dont vous avez la responsabilité.
- ✓ Développer et contribuer à des projets spécifiques.

OU BIEN

Directly reporting to the Head of Absolute Return & Quant Equity, the core tasks are the following :

The focus will be on the following strategies : Risk Arbitrage, Index arbitrage, Long/Short Equity, and Quant Equity funds

1/ Develop with portfolio managers relevant marketing contents about the funds,

- Deal with all communication and sales support related to the investment fund range,
- Deliver an effective and high-quality marketing material and monitor the available documentation.

2/ Liaise with PMs / CRMs / and Marketing teams,

- Act as an internal contact point for all requests for information on the Absolute Return and Quant Equity investment strategies.
- Provide an in-depth knowledge to Candriam sales of the technical aspects of the fund range and investment processes, performances, comparison with our peers, etc.
- Work closely together with the other team members of CPM, and other Candriam business units involved in fund and portfolio management (Risk, Performance Attribution, Financial Engineering, Legal, ...)

3/ Assume key interface role with funds' clients and actively participate in the recognition of the business unit expertise.

- Give presentations, share information sessions and deliver training courses on our products and know-how,
- Represent portfolio managers when needed in conference calls and client meetings.

OU BIEN

As CPM – ESG, you will support the ESG team and, in particular, the other Client Portfolio Managers on the following topics:

- Updating of all SRI marketing documentation: Assisting other teams in structuring new business presentations and support materials,
- Answering Standard and bespoke RFP requests as well as helping the ESG analysts drafting comments to specific commercial, marketing or client requests,
- Communicating complex analysis and ideas in a concise and coherent way, both externally and internally.

In addition to the coordination with the other CPMs, you will be the point of contact for our sales, marketing and fund management departments. The role will involve addressing the specific requests from clients, maintaining relations with other departments, including reporting, fund management and the sales department and ensure that all ESG documents and presentations of Candriam's standard material as well as documentation on specific ESG issues are up to date.

OU BIEN

Responsabilités du PDP :

• Attend client meetings to present Candriam's ESG methodology.
• Answer ESG specific questions within RFPs
• Steer seveal SRI label auditing processes
• Answer ongoing ESG related sales enquiries related to Candriam's suite of ESG products, companies, ESG performance indicators, regulation.
• Write short commentaries on ESG fund performance, ESG market trends, and other ESG related topics
• Prepare professional powerpoint presentations on a variety of ESG topics. These presentations can be used with investors externally, for conferences, or internally.

Required Skills & Competencies

PROFIL

- ✓ Expérience de 7 à 10 ans dans la gestion financière, la banque privée et/ou des activités similaires;
- ✓ Excellentes connaissances et solide compréhension des marchés et des instruments financiers;
- ✓ Titulaire d'un Master;

- ✓ Spécialisation complémentaire, telle que la certification CFA (préférablement) ou volonté d'obtenir une telle certification.

COMPETENCES

- ✓ Excellentes aptitudes à la communication et à la présentation
- ✓ Néerlandais (langue maternelle), Anglais (le français est un plus)
- ✓ Animé(e) d'un esprit d'équipe, vous aimez travailler en équipe
- ✓ Bonne compétences en analyse quantitative
- ✓ Motivation, sens de l'initiative, esprit analytique, entrepreneurial, créatif, dynamique,
- ✓ Ambitieux
- ✓ Assertivité, flexibilité sociale et ouverture au changement/à l'évolution
- ✓ Réflexion structurée et méthodique
- ✓ Capacité à travailler dans des environnements stressants

OU BIEN

- ✓ Excellent communication skills
- ✓ Rigourous
- ✓ English and French fluent
- ✓ Proactive
- ✓ Powerpoint and Excel knowledge
- ✓ Master's Degree in Finance
- ✓ Approx. 3 years of professional experience within a similar role , sales role or any other role within the asset management industry
- ✓ Technical background and knowledge of investment process

OU BIEN

- ✓ Demonstrable experience of working in the financial industry, with knowledge of investments across asset classes,
- ✓ Ability to work independently or collaboratively, particularly with other teams across the business,
- ✓ Ability to manage and contribute to projects,
- ✓ Enthusiastic and engaged, with a keen willingness to learn,
- ✓ Excellent communication and writing skills,
- ✓ Knowledge and experience in asset management,
- ✓ Awareness of stewardship, corporate governance or ESG,
- ✓ Fluent English, French and Dutch.