[First Last Name]

[City, Country] | [email@example.com] | [+1 (555) 555-5555] | [LinkedIn URL]

PROFESSIONAL SUMMARY

Results-driven **[Portfolio Manager]** with [X+] years of experience overseeing multi-asset portfolios across [equities/fixed income/alternatives] for [institutional/high-net-worth] clients. Proven track record of delivering risk-adjusted outperformance against benchmarks through disciplined **asset allocation**, **security selection**, and **risk management**. Adept at leveraging **quantitative analysis**, market research, and client objectives to construct and rebalance portfolios aligned with investment policy statements. Strong communicator skilled at presenting complex investment strategies and performance results to both technical and non-technical stakeholders.

PROFESSIONAL EXPERIENCE

[Senior Portfolio Manager] | [Global Asset Management Firm]

[Month Year] – Present | [City, Country]

- Managed [\$XXXM+] in discretionary multi-asset portfolios for [institutional/high-net-worth] clients, achieving an average annual excess return of [X.X%] vs. the [benchmark index] over [X] years while maintaining target risk parameters.
- Led the development and implementation of a systematic **strategic and tactical asset allocation** framework using [Excel/VBA, Python, Bloomberg PORT, FactSet] to optimize risk/return trade-offs, improving portfolio Sharpe ratios by [X%].
- Collaborated with **investment research, trading, and risk** teams to integrate macroeconomic views, factor exposures, and ESG considerations into portfolio construction; communicated strategy and performance through quarterly client reviews and detailed investment reports.

[Portfolio Analyst / Associate Portfolio Manager] | [Regional Wealth Management Firm]

[Month Year] – [Month Year] | [City, Country]

- Supported management of [\$XXM+] in balanced portfolios by conducting **security analysis**, performance attribution, and risk analytics using [Morningstar Direct, Bloomberg, MSCI Barra] to inform investment decisions.
- Built and maintained **portfolio monitoring dashboards** in [Excel/Power BI/Tableau] to track exposures, drawdowns, and compliance with investment policy statements, reducing manual reporting time by [X%].
- Prepared investment committee materials, including **asset allocation proposals**, scenario analyses, and backtests of model portfolios, contributing to the adoption of a new model suite that improved consistency across client accounts.

EDUCATION

[Master of Finance] | [Top-Ranked University]

[Month Year] – [Month Year] | [City, Country]

Relevant Coursework: [Portfolio Theory], [Fixed Income Securities], [Derivatives], [Financial Econometrics], [Risk Management]

[Bachelor of Economics / Business Administration] | [University Name]

[Month Year] – [Month Year] | [City, Country]

Honors: [Cum Laude / Dean’s List] | Activities: [Investment Club], [Finance Society]

SKILLS

Portfolio & Investment: [Strategic & Tactical Asset Allocation], [Multi-Asset Portfolio Construction], [Security Selection], [Performance Attribution], [Risk-Adjusted Return Optimization]

Analytics & Tools: [Bloomberg], [FactSet], [Morningstar Direct], [Excel (Advanced Modeling)], [Power BI/Tableau], [Python/R for Quantitative Analysis]

Risk Management: [Value at Risk (VaR)], [Stress Testing & Scenario Analysis], [Tracking Error Management], [Liquidity Risk], [Compliance with IPS/Regulatory Guidelines]

Markets & Products: [Equities], [Fixed Income], [ETFs & Mutual Funds], [Derivatives for Hedging], [Alternative Investments], [ESG/Responsible Investing Principles]

Client & Stakeholder: [Client Relationship Management], [Investment Reporting], [Presentation of Performance & Strategy], [Consultative Communication], [Expectation Management]

Professional Attributes: [Analytical Thinking], [Detail Orientation], [Decision-Making Under Uncertainty], [Collaboration with Cross-Functional Teams], [Time Management]

SELECTED PROJECTS

[Model Portfolio Suite Redesign] | [Global Asset Management Firm]

[Month Year] – [Month Year]

- Redesigned a suite of risk-based model portfolios (e.g., conservative, balanced, growth) using a **mean-variance optimization** framework in [Excel/Python], incorporating capital market assumptions, constraints, and client risk profiles.
- Backtested proposed models over [X]-year historical periods and stressed them through [2008/2020] market scenarios, demonstrating improved downside protection and higher long-term risk-adjusted returns vs. legacy models.

[ESG Integration Framework for Client Portfolios] | [Regional Wealth Management Firm]

[Month Year] – [Month Year]

- Developed a standardized **ESG integration** approach for client portfolios by defining exclusion criteria, minimum ESG scores, and engagement guidelines in partnership with the research team and external data providers.
- Implemented ESG screening and reporting in [Bloomberg/Morningstar], enabling advisors to present clear ESG metrics and alignment with client values, leading to increased adoption of ESG strategies among interested clients.