

## **Portfolio Manager / Investment Analyst**

**Location:** Karachi

**Employment Type:** Full-time

**Vision Capital Limited** is an **SECP-licensed investment advisor** and financial services firm offering portfolio management for institutional and high-net-worth clients, strategic financial advisory, REIT management services, M&A support, and capital raising solutions.

We are seeking an **Investment Analyst** who will play a key role in supporting our investment advisory and portfolio management efforts — helping clients achieve their financial goals through rigorous research, disciplined execution, and high-quality reporting.

### **Core Responsibilities**

- Assist in the management of discretionary and non-discretionary investment portfolios in line with client mandates and risk profiles
- Prepare monthly, quarterly, and annual portfolio performance reports for clients and management
- Assist the management in business development activities as necessary
- Conduct investment research on equities, mutual funds, fixed-income instruments, and other approved asset classes
- Analyse company financials, valuations, market trends, and macro-economic indicators
- Prepare investment proposals, asset allocation recommendations, and research notes
- Monitor portfolio performance, risk, and compliance with investment guidelines
- Develop and maintain portfolio dashboards and reporting tools for management and client reporting
- Support the Investment Committee by preparing presentations, research packs, and performance summaries
- Maintain investment records and documentation in line with SECP and internal compliance requirements

### **Required Qualifications & Skills**

#### **Education**

- **CFA Level I / ACCA / CA / MBA (Finance)**
- Experience in investment advisory, research, asset management, brokerage, or financial analysis preferred

#### **Technical Skills**

- Strong financial statement analysis and valuation skills (DCF, multiples, yield analysis)
- Advanced Microsoft Excel (financial models, pivot tables, scenario analysis)
- Ability to prepare and maintain portfolio performance dashboards
- Experience with Power BI, Tableau, or Excel-based dashboards for investment reporting
- Ability to make presentations in PowerPoint

- Strong understanding of portfolio analytics, benchmarks, asset allocation, and risk metrics
- High-quality report writing and presentation skills

**Personal Attributes**

- Strong analytical and problem-solving mindset
- High level of integrity, confidentiality, and professionalism
- Ability to communicate financial information clearly
- Organized, detail-oriented, and deadline-driven

**What We Offer**

- Exposure to real client portfolios and institutional-grade investment processes
- Learning under experienced investment and advisory professionals
- Career path toward Investment Advisor / Portfolio Manager roles
- Competitive compensation and performance-based growth

✉ **Apply by sending your CV to:** [info@visioncapitallimited.com](mailto:info@visioncapitallimited.com)