

Investment Specialist (Mashreq Global Network Pakistan)

Mashreq · Pakistan (Remote)

About the job

Job Purpose

- The primary responsibility of this role is to engage with existing clients to promote the bank's investment offerings. This includes assisting clients in completing their investment transactions through the bank's digital platforms.
- A key aspect of the position is to develop strategies that drive user adoption and engagement with the bank's investment products. This involves understanding client needs and behavior to effectively encourage greater use of these offerings.
- The role is accountable for achieving KPIs related to investment penetration, growth in assets under management (AUM) and increasing the bank's investment revenues through proactive client engagement and targeted strategies.
- Collaborate with internal stakeholders to create campaigns, educational content, and tools aimed at promoting awareness of investment products among clients.
- Collecting and providing feedback based on customer interactions for continuous improvement. Insights gathered are used to enhance the digital journey and refine the investment offerings available to clients.

Key Result Areas

- Achieve the prescribed objectives for Investment Revenues, growth in AUMs and Increase in Investment Penetration Targets.
- Ensure that clients' requests and requirements are addressed with the utmost transparency, and handle clients' objections with the utmost care.
- Act as subject matter expert for Investment Offering within the segment
- Work with Investment Product Team on driving new product Ideas in the segment
- Success of various campaigns targeted towards growth in AUMs or acquiring new to Investment clients

Knowledge, Skills and Experience

- Knowledge of financial markets, products, financial instruments, correlations, portfolio management theory.
- 5-6 years' experience in similar work environment
- Thorough knowledge of strategic and tactical asset allocation fundamentals.
- Knowledge on risk profiling of clients with reference to choosing the right product for the right investor.
- Preferred to have CFA / FRM/ CAIA Charter or pursuing the CFA/FRM/CAIA Program.
- Minimum Bachelor's Degree from a reputed institution.

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