

## **Investment Operations Associate**

Lumida Wealth · Karāchi, Sindh, Pakistan (On-site)

## **About the job**

### **About Lumida**

Lumida Wealth is a digitally native, independent investment advisor specialising in alternative investments. We're on a mission to redefine wealth management—bringing together **investment excellence, innovative thinking**, and the best of trust and estate planning in a seamless **digital experience**. Recognized by industry media and trusted for our differentiated, non-consensus insights, Lumida is reshaping how modern investors build and preserve wealth.

### **Who You Are**

- 🔍 **Detail-Oriented Perfectionist** – You catch the smallest discrepancies and ensure every report, trade, and allocation is precise.
- 📋 **Curious Analyst** – You love learning and simplifying complexity, always looking for ways to improve workflows.
- 👥 **Team-First Operator** – You collaborate naturally and build trust with PMs and advisors through thoughtful execution.
- ⚡ **Proactive & Reliable** – You anticipate needs, solve problems early, and stay calm under pressure.
- ⚙️ **Adaptable Multitasker** – You thrive in dynamic environments and pivot smoothly between tasks and priorities.
- 💬 **Client-Savvy Communicator** – You understand the human side of wealth management and communicate with empathy and professionalism.
- 🛠️ **Creative Problem-Solver** – You think ahead and craft efficient, lasting solutions to operational roadblocks.

### **What You'll Be Doing**

#### **📊 1. Portfolio Management & Oversight**

- Ensure portfolio accuracy by maintaining correct positions, weights, and valuations.
- Execute rebalancing instructions on time and within guidelines.
- Monitor deviations from model allocations and flag exceptions.
- Track and control cash drift to stay within set parameters.
- Identify and resolve portfolio model drift exceptions.

#### **📈 2. Client Review & Reporting**

- Prepare timely, accurate performance and holdings review packs.
- Complete scheduled client portfolio reviews with high consistency.
- Incorporate customizations efficiently and accurately.
- Optimize production efficiency of reporting packs with minimal errors.

### 3. Rebalancing Process Management

- Generate accurate trade instructions with minimal need for manual correction.
- Reduce reliance on manual overrides by using automation and sound judgment.
- Comply with rebalance frequency policies and ensure timely execution.

### 4. Performance & Risk Monitoring Support

- Maintain high data integrity in performance attribution reports.
- Proactively escalate any risk threshold breaches.
- Track and monitor volatility, flagging abnormal movements in portfolios.

### 5. Advisory & PM Desk Collaboration

- Respond to PM and advisor requests with speed and precision (e.g., drift reports, exposure summaries, cash requests).
- Earn consistently high satisfaction scores through clear, timely, and accurate support.

## What We're Looking For

- Strong analytical skills and obsession with accuracy.
- Experience with portfolio management platforms like Bloomberg, FactSet, or similar.
- Excellent prioritization and time management — you're organized and efficient.
- Familiarity with risk reporting, attribution analysis, and rebalancing workflows.
- Collaborative mindset and proactive communication with internal stakeholders.
- Comfortable working in a high-output, fast-paced, and evolving environment.
- Bonus if you're comfortable building workflows or databases in tools like Airtable.

## Minimum Qualifications

- Bachelor's degree in Finance, Economics, Business, or a related discipline.

- 2+ years in investment operations, portfolio management, or wealth management.
- Familiarity with rebalancing, model portfolios, client reporting, and risk monitoring.
- CFA designation preferred (or pursuing).
- Proficiency in portfolio tools (e.g., Bloomberg, FactSet), plus a bonus for automation or data experience.

### ***Why Join Lumida?***

**✈ Work directly with a seasoned founder** – Gain firsthand insights and mentorship from leadership with deep industry experience.

**🌐 Be at the frontier** – Join a dynamic, innovative firm at the cutting edge of crypto, wealth tech, and alternative investments.

**🔥 Collaborate with talent** – Team up with passionate professionals on a mission to transform the future of finance.

**📈 Grow with us** – Enjoy real opportunities for learning, development, and upward mobility in a fast-scaling company.

**💰 Get rewarded** – Competitive salary, equity upside, and a comprehensive benefits package.

At Lumida, you will join a team that values the holistic growth of both clients and employees. We offer an environment conducive to **continuous learning, intellectual development, and impactful community engagement, all built on a foundation of exceptional investment expertise.**

**Can't wait to have you onboard!**

To apply: <https://www.linkedin.com/jobs/view/4228161067>