

Job Description: Chief Investment Officer (CIO) – Mutual Fund

Position Summary:

The Chief Investment Officer (CIO) will be responsible for overseeing the investment strategies, portfolio management, and overall performance of a mutual fund's assets. This role ensures that investment decisions align with the fund's objectives, regulatory requirements, and fiduciary responsibilities. The CIO leads the investment team, drives strategic asset allocation, and develops policies to maximize returns while managing risks.

Key Responsibilities:

Strategic Investment Leadership:

- Develop and oversee the mutual fund's overall investment strategy in line with its objectives and risk tolerance.
- Establish and execute asset allocation policies across asset classes (equities, fixed income, alternatives, etc.).
- Monitor global and domestic financial markets to identify investment opportunities and risks.
- Provide guidance on tactical and strategic shifts in portfolios based on market conditions.

Portfolio Management Oversight:

- Supervise portfolio managers to ensure adherence to investment guidelines and performance benchmarks.
- Review and approve major investment decisions, ensuring they are research-backed and align with the fund's strategy.
- Evaluate and optimize the fund's performance through active and passive management techniques.
- Manage and oversee rebalancing activities and liquidity requirements.

Risk Management and Compliance:

- Implement robust risk management frameworks to monitor and control exposure to various financial risks.
- Ensure compliance with regulatory standards (e.g., SEC, SEBI, or other applicable bodies) and the fund's internal policies.
- Review investment operations to maintain transparency and accountability.

Team Leadership and Collaboration:

- Lead, mentor, and manage the investment team, fostering a high-performance culture.
- Collaborate with other departments (e.g., marketing, compliance, and operations) to align investment strategies with business goals.
- Represent the mutual fund in meetings with stakeholders, including the board of directors, investors, and external analysts.

Stakeholder Communication:

- Report on fund performance and investment strategies to key stakeholders.
- Provide insights on market trends, economic developments, and potential impacts on the fund's portfolio.
- Act as the spokesperson for the mutual fund's investment philosophy and strategy in public forums.

Qualifications and Skills:

Education and Certification:

- Bachelor's degree in Finance, Economics, or a related field (Master's or MBA preferred).
- Professional certifications such as CFA (Chartered Financial Analyst) or CAIA (Chartered Alternative Investment Analyst) are highly desirable.

Experience:

- 12–15+ years of experience in investment management, with a significant portion in mutual fund operations.
- Proven track record in portfolio management, asset allocation, and leading investment teams.

Core Competencies:

- Deep knowledge of financial markets, asset classes, and economic indicators.
- Strong analytical, decision-making, and problem-solving skills.
- Excellent leadership, communication, and interpersonal abilities.
- Proficiency in investment analytics tools and platforms (e.g., Bloomberg, Morningstar, or similar).

Key Performance Indicators (KPIs):

- Achievement of portfolio performance benchmarks.
- Effective risk-adjusted returns.
- Regulatory compliance and audit outcomes.
- Employee and team engagement levels.
- Stakeholder satisfaction with fund performance and reporting.

This role requires a forward-thinking, data-driven, and strategic mindset to navigate the complexities of financial markets while aligning the mutual fund's objectives with its long-term growth strategy.

Job location : Andheri (East)