FUTUREGROWTH
/ ASSET MANAGEMENT

FUTUREGROWTH ASSET MANAGEMENT IS RECRUITING!

We have an exciting opportunity available for a **Lead: Client and Portfolio Operations** in our Client Delivery Team.

Futuregrowth is committed to transformation. A strong preference will be given to suitably qualified previously disadvantaged candidates.

Lead: Client and Portfolio Operations
The successful candidate will provide day-to-day direction to the Client Operations team across BAU, ensuring disciplined delivery, strong controls, operational resilience and continuous improvement. The role requires a strong passion for portfolio operations, experience with both local and international operations environments, sound technical proficiency, and the ability to use data, process optimisation, automation and AI-enabled tools.

Who is Futuregrowth?

Futuregrowth has been South Africa's leading developmental, responsible and fixed-income investor for over 25 years. We manage a range of fixed interest and development funds and play a key leadership role in the South African asset management industry. We are committed to investing our clients' funds in a responsible manner, with the interests of our clients always coming first.

Purpose of the position

The Team Lead reports to the Manager and is responsible for day-to-day delivery across client and portfolio operations, including execution, controls, exception management, team coordination and continuous improvement.

The role requires strong asset management operations knowledge, internal operations experience, a risk and control mindset, and confidence using data, technology, automation and AI-enabled tools to improve accuracy, efficiency and operational resilience.

Key responsibilities of the position

The successful candidate will fulfil the following primary functions:

Portfolio Operations and Client Delivery Oversight

- Responsible for the oversight of day-to-day portfolio operations, including cash flows, transitions, and fees processing, cash flow and AUM reporting and other operational client deliverables;
- Ensuring operational outputs are accurate, complete, timely and aligned to agreed service standards;

- Monitoring exceptions, dependencies and recurring issues, escalating material matters to the Manager;
- Providing day-to-day guidance to the team on complex client, fund and portfolio-related operational matters before escalation to the Manager; and
- Working with internal teams, custodians and service providers to maintain robust execution and control.

Cash Risk, Banking and Control Support

- Responsible for the oversight of day-to-day banking and cash operations, including transaction processing, account administration and cash movement controls;
- Ensuring maker-checker controls, segregation of duties and evidence of review are applied consistently;
- Tracking cash-related risks, incidents and near misses, ensuring timely remediation and reporting to the Manager; and
- Maintaining effective working relationships with banking partners, custodians, trustees and internal stakeholders.

Service Metrics, Reporting and Insight

- Tracking and maintain client delivery metrics, service levels, performance trends and recurring service issues;
- Using data insights to identify service gaps, control weaknesses and process bottlenecks; and
- Recommending improvements that strengthen the client delivery model and overall client experience.

Technology, Automation and Process Optimisation

- Identifying and driving opportunities to improve efficiency, reduce manual effort and strengthen controls;
- Using data, workflow tools, automation and AI-enabled solutions to improve accuracy, reporting and turnaround times;
- Working with relevant internal stakeholders to implement practical process improvements; and
- Responsible for ensuring all SOPs, improved processes, controls, handovers and any changes are documented and maintained.

Team Leadership, Delivery Support and Culture

- Responsible for daily workload planning, prioritisation, capacity management and delivery oversight;
- Guiding, coaching and supporting team members to build capability, resilience and delivery discipline;
- Acting as the day-to-day escalation point for queries, exceptions and stakeholder follow-ups, with appropriate Manager visibility; and

- Role-model professionalism, collaboration, accountability and a strong risk and control mindset.

Knowledge and experience required

Skills and technical experience:

- Minimum of 6-8 years' experience in institutional asset management operations, with strong exposure to portfolio administration, cash flows, transitions, reconciliations, client deliverables and internal operations processes.
- Experience in a senior analyst, senior specialist, supervisory or team lead capacity in institutional asset, management, with demonstrated responsibility for team delivery, workload coordination, operational prioritisation and stakeholder management in a high-control environment.
- Strong technical understanding of asset management operations, financial instruments, segregated and unitised fund structures, and operational service provider dependencies.
- Advanced proficiency in Excel, data analysis and reporting, with the ability to interpret trends, identify exceptions and produce clear management insights.
- Practical experience using systems, workflow tools, automation, AI-enabled tools or process improvement techniques to improve operational efficiency, accuracy and control.
- Experience with Microsoft D365, Infostore, Hi-Port, CRIMS, Finswitch or similar investment administration, dealing, workflow, client relationship management or reporting systems will be advantageous.
- Working knowledge of South African investment products, regulatory requirements, governance disciplines and operational risk management will be advantageous.
- Demonstrated ability to manage day-to-day delivery, guide team members through complex operational issues, strengthen controls and support continuous improvement in partnership with the Manager.

Professional qualifications:

- BCom, BCom Honours or similar qualification with a focus on financial subjects, or a related field.

Key behaviours and competencies:

- Strong control mindset, with a disciplined approach to accuracy, evidence, segregation of duties and operational risk management;
- Analytical and technology-confident, with curiosity around automation, AI, data-led insights and process optimisation;
- Planning and organisational strength, with the ability to coordinate priorities, manage dependencies and support sustainable team delivery;

- High-quality orientation, attention to detail and commitment to timely, complete and accurate operational outputs;
- Clear, professional and confident communication skills, with the ability to escalate matters appropriately and engage constructively with stakeholders;
- Collaborative leadership style, with the ability to coach, guide and support team members while maintaining clear responsibility for day-to-day delivery;
- Proactive problem-solving capability and willingness to improve how work is delivered;
- Strong problem-solving capability, with the ability to analyse complex client and fund-related issues, guide team members and recommend practical solutions; and
- Professional judgement, resilience and maturity in a fast-paced, high-performance environment.

Recruitment process

Selected candidates will need to attend a series of competency-based interviews/ activities and a psychometric assessment.

Application Link

Click here to apply (https://bit.ly/4qxNrNb)