



Senior Portfolio Manager

Johnathan Harris

Professional summary

Experienced Senior Portfolio Manager with over 14 years of expertise in overseeing multi-billion-dollar equity and fixed income portfolios for institutional clients. Proven track record of delivering consistent outperformance by utilizing quantitative analysis, macroeconomic research, and risk management strategies.

Experience

Senior Portfolio Manager

July 2016 - Now

JPMorgan Asset Management – New York, NY /

- Manage a portfolio of .2 billion in global equities, focusing on sectors such as technology, healthcare, and energy.
- Lead a team of 4 analysts to conduct detailed market research, macroeconomic analysis, and investment strategy development.
- Achieved annualized returns of 9.6% over the past five years, outperforming the benchmark index by 150 basis points.
- Conduct extensive risk management using value-at-risk (VaR) and stress testing techniques, ensuring compliance with client risk tolerance levels.
- Direct client relationships, including quarterly updates and presentations to institutional investors, ensuring full transparency.

Equity Portfolio Manager

June 2011 - June 2016

BlackRock – New York, NY /


- Managed a .1 billion equity portfolio, primarily focused on large-cap growth and value stocks in the US market.
- Developed and implemented investment strategies resulting in a 12% annualized return for clients, outperforming the S&P 500 index by 200 basis points.
- Utilized fundamental and technical analysis to assess and select high-performing companies for the portfolio.
- Led quarterly client meetings and investment presentations, building long-term relationships with institutional investors.


Leadership & Community Involvement


Board Member

New York Society of Security Analysts (NYSSA)

Actively contribute to initiatives that promote the development of best practices in investment management.

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 jharris@example.com

 New York, NY, Willing to relocate to California

Links

LinkedIn: /in/johnathanharris

Education

Master of Business Administration (MBA)

Columbia Business School – New York, NY


Graduated: May 2010


Bachelor of Science in Finance


University of California, Berkeley – Berkeley, CA


Graduated: May 2004

Skills

CFA Charterholder (CFA Institute) 

Financial Risk Manager (FRM) Certification 

Bloomberg Terminal, FactSet, and Morningstar Direct 

Advanced Excel and Python for Financial Modeling 

Strong communication, team leadership, and client management skills 