



SAARTHI - सारथी

करियर मार्गदर्शन पोर्टल · Career Guidance Portal

"सही मार्गदर्शन, उज्ज्वल भविष्य।"

करियर शीट · CAREER SHEET

निवेश / पोर्टफोलियो प्रबंधक

Portfolio/investment managers build strategies to invest the money of individuals and institutions in shares, bonds and more, deciding when, where and how to invest to minimise risk and maximise returns.



Scan for everything on this career

Salary, exams, colleges, the routes in and the steps after — all on the portal.

career.gsssjethantri.in/#/career/portfolio-manager

राजकीय उच्च माध्यमिक विद्यालय, जेठन्तरी

Govt. Sr. Sec. School, Jethantri · ब्लॉक समदड़ी · बालोतरा (Block Samdari · Balotra)

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सुशील कुमार शर्मा

प्रधानाचार्य, रा.उ.मा.वि. जेठन्तरी · मास्टर ट्रेनर
Principal, GSSS Jethantri · Master Trainer



श्री चेनाराम चौधरी

प्रधानाचार्य, डाइट बाड़मेर
Principal, DIET Barmer



श्रीमती संघमित्रा

वरिष्ठ व्याख्याता, डाइट बाड़मेर (सहयोग)
Sr. Lecturer, DIET Barmer (Support)



भरत चौधरी

अभिकल्पना व विकास · व्याख्याता (इतिहास)
Designed & developed · Lecturer (History)

विशेष धन्यवाद · SPECIAL THANKS



सुरेन्द्र सिंह राठौड़

व्याख्याता (इतिहास) · रा.उ.मा.वि. कानाना



सुरेश कुमार सैन

व्याख्याता (भूगोल) · रा.उ.मा.वि. रामसीन मूंगड़ा



वनिता कुमारी

व्याख्याता (इतिहास) · रा.उ.मा.वि. रामसीन मूंगड़ा



कमलेश चौधरी

व्याख्याता (राजनीति विज्ञान) · रा.उ.मा.वि. टापरा

करियर मार्गदर्शन कार्यशाला, डाइट बाड़मेर (14-17 जुलाई 2026) में विकसित व लोकार्पित
Developed & unveiled at the Career Guidance Workshop, DIET Barmer (14-17 July 2026)

यह एक स्वतंत्र परियोजना है, जो सरकार की आधिकारिक करियर-मार्गदर्शन सामग्री पर आधारित है। · An independent project based on the Government's official career-guidance content.

1 About this career

Portfolio/investment managers build strategies to invest the money of individuals and institutions in shares, bonds and more, deciding when, where and how to invest to minimise risk and maximise returns.

2 At a glance

Minimum qualification	Finance degree + MBA/CFA
Starting salary	Rs 8-15 LPA
Key Path	Research to fund management + CFA
Work mode	AMCs, PMS, investment firms

3 What you need

INTERESTS

- Being careful and organised
- Attention to detail
- Working with numbers and data

ABILITIES

- Strong analytical and decision-making ability
- Staying calm under pressure
- Ability to assess risk

KEY SKILLS

- Portfolio construction and asset allocation
- Risk management
- Data analysis and Excel
- Financial and valuation analysis
- Market and macro-economic understanding
- Client communication and reporting

4 How to get there

- 1 Complete 10+2 in Commerce.
- 2 Do a B.Com/BBA/BFSI bachelor's degree.
- 3 Do an MBA or master's in finance.
- 4 A CFA credential is highly beneficial.
- 5 Start as a research/analyst and grow into fund manager.

MAIN EXAMS

- CAT for MBA admission
- NISM PMS/Research certifications
- CFA programme examinations

5 Where to study

GOVERNMENT INSTITUTES

- IIM Bangalore — Bengaluru, Karnataka
- University of Mumbai — Mumbai, Maharashtra
- University of Rajasthan — Jaipur, Rajasthan

PRIVATE INSTITUTES

- BITS Pilani — Pilani, Rajasthan
- Christ University — Bengaluru, Karnataka
- Nirma University — Ahmedabad, Gujarat

ONLINE

- CFA Institute — Online (<https://www.cfainstitute.org>)
- NPTEL SWAYAM (Commerce) — Online (<https://swayam.gov.in>)

FEES

Degree/MBA fees roughly Rs 1,00,000-20,00,000; CFA extra. Varies by institute.

SCHOLARSHIPS

- National Scholarship Portal (<https://scholarships.gov.in>)
- Vidyalakshmi Education Loan (<https://www.vidyalakshmi.co.in>)

- Buddy4Study (<https://www.buddy4study.com>)

6 What the work is like

WHERE YOU WORK

Asset-management (mutual fund) companies, portfolio management services (PMS), investment banks, insurance and investment firms; also freelance advisors.

WORK CULTURE

A desk job; usually 5-6 days a week, 10-12 hours. Requires alertness to markets. Opportunities exist for persons with disabilities.

WHO HIRES

- | | |
|------------------------|----------------------------|
| • SBI Mutual Fund | • HDFC Asset Management |
| • ICICI Prudential AMC | • Nippon India Mutual Fund |
| • Kotak Mahindra AMC | • Motilal Oswal AMC |

DEMAND (2026)

India's mutual fund and PMS industry is growing fast, so demand for experienced portfolio managers is strong in 2026.

7 Career growth

- 1 Trainee/Junior Analyst
- 2 Senior Analyst
- 3 Fund Manager
- 4 Senior Fund Manager
- 5 Chief Investment Officer (CIO)

EARNINGS

Starting	₹8-15 लाख/वर्ष
Mid level	₹25-50 लाख/वर्ष
Senior level	₹1 करोड़+/वर्ष

Performance-based bonuses form a big part; figures are indicative.

8 The good parts · The challenges

The good parts

- High pay and prestige
- Intellectually challenging work
- Direct impact on portfolios

The challenges

- Constant pressure of market volatility
- Tough accountability for performance
- Takes years to reach this level

9 Real-life journeys

Harini Dedhia

Portfolio manager, Tamohara Investment Managers

Harini Dedhia is a portfolio manager at Tamohara Investment Managers in Mumbai. She graduated in economics and mathematics from New York University and, after hedge-fund experience in the US, has worked in India's capital markets since 2013.

PMS Bazaar · <https://pmsbazaar.com/FundManager/Tamohara-Investment-Managers-Pvt-Ltd/Harini-Dedhia>

Prashant Jain

Former CIO, HDFC Mutual Fund

An IIT and IIM alumnus, Prashant Jain is regarded as one of India's most successful fund managers. Over 28 years at HDFC Mutual Fund he created long-term wealth for investors, becoming a role model for millions.

Cafemutual · <https://cafemutual.com/news/industry/25008-prashant-jain-bids-adieu-to-hdfc-mf-after-28-remarkable-years>

10 If this route does not work out

One exam or one attempt does not close the door. The same subjects also open these routes — entry is usually easier, and you can return to this field later.

- Relationship Manager
- Investment Banker
- Venture Capitalist

11 Sources & further reading

1. Rajasthan Career Guidance: Portfolio Manager — <https://cg.rajasthan.gov.in/careerguidance/hi/career/%e0%a4%a8%e0%a4%bf%e0%a4%b5%e0%a5%87%e0%a4%b6-%e0%a4%aa%e0%a5%8b%e0%a4%b0%e0%a5%8d%e0%a4%9f%e0%a4%ab%e0%a5%8b%e0%a4%b2%e0%a4%bf%e0%a4%af%e0%a5%8b-%e0%a4%aa%e0%a5%8d%e0%a4%b0%e0%a4%ac%e0%a4%82/>
2. SEBI (Regulator) — <https://www.sebi.gov.in>
3. AMFI — <https://www.amfiindia.com>



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