

Portfolio Manager

Investment Management | Oakville, ON

Department	Investment Management
Reports to	Co-Chief Investment Officer
Location	Oakville
Employment type	Full-time, permanent – on-site

ABOUT HARVEST ETFs

Harvest Portfolios Group Inc. is a Canadian investment fund manager offering a family of exchange-traded funds spanning equity income, sector-focused, fixed income, and asset allocation strategies, including a suite of covered call and derivative-overlay ETFs. The Investment Management team is responsible for the day-to-day trading, construction, and risk management of the fund lineup.

ROLE SUMMARY

The Portfolio Manager supports the Portfolio Management team in the trading and ongoing management of Harvest's ETF suite, with a particular focus on listed options overlay strategies alongside Canadian equity, US equity, sector-focused, and asset allocation mandates. The role combines hands-on trading execution with portfolio construction, risk monitoring, and product support, and is expected to progress toward increasing portfolio management authority.

KEY RESPONSIBILITIES

Portfolio Management

- Support senior Portfolio Managers in the day-to-day management of sector-focused, asset allocation, and multi-asset ETF strategies.
- Monitor portfolio exposures, sector/security weights, cash balances, and compliance with fund investment objectives and NI 81-102 requirements.
- Contribute to asset allocation decisions and tactical positioning recommendations across the fund lineup.
- Assist with the design and structuring of new fund launches, including options-overlay and asset allocation products.

Trading & Execution

- Participate in the oversight of trade execution across Canadian equities, US equities, and listed options (including covered call writing and other overlay strategies) for assigned funds.
- Monitor intraday market conditions, liquidity, and volatility to inform option strike/expiry selection and roll timing.
- Manage creation/redemption activity, cash flows, and basket composition in coordination with designated brokers and market makers.
- Execute portfolio rebalances, index changes, and fund transitions with minimal market impact.

Risk & Compliance

- Monitor fund-level risk metrics, tracking error, and concentration limits.
- Ensure trading and portfolio activity remain within regulatory guidelines and internal investment policy limits.
- Escalate breaches or emerging risks to senior Portfolio Managers and Compliance in a timely manner.

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KEY RESPONSIBILITIES cont.

Research & Product Support

- Conduct market, sector, and single-name research to support trading and positioning decisions.
- Analyze options market dynamics, implied volatility, and yield-generation opportunities for covered call strategies.
- Preparation of investment commentary, performance attribution, and materials for product, sales and marketing teams.
- Participate in ongoing communications across multi-channel marketing initiatives.

QUALIFICATIONS

Experience

- 5–7 years of experience in Canadian, US equities or developed global equities.
- Prior experience within an ETF, mutual fund, or asset management platform.
- Exposure to sector-focused, asset allocation and index tracking fund structures is an asset.
- Demonstrated understanding of ETF mechanics.

Education & Licensing

- Undergraduate degree.
- CFA Charter or progress toward completion; CIM or equivalent considered.
- Eligible for registration as an Associate Portfolio Manager (or equivalent) under NI 31-103 with the applicable securities regulator(s).

Skills

- Strong quantitative and analytical skills, with fluency in options pricing, volatility analysis, and portfolio risk metrics.
- Proficiency with order management and trading systems, Bloomberg, and Excel-based portfolio/risk tools.
- High attention to detail and comfort operating in a fast-paced, deadline-driven trading environment.
- Clear written and verbal communication skills for cross-functional collaboration with Sales, Compliance, and Product teams.

WHAT HARVEST ETFS OFFERS

- A collaborative and engaged investment team with a clear path toward expanded portfolio management responsibility.
- Direct exposure to portfolio management, options trading across a diversified, publicly listed ETF platform.
- High growth, fast paced environment with entrepreneurial spirit.
- Competitive compensation, including base salary and performance-based incentive.