

Prompt Pack — Investment Analysts

Permodalan Nasional Berhad — Investments · PUMA · PSI · PNB UK

Every prompt below follows the C.G.S.E framework — Context, Goal, Source, Expectation. Replace anything in [brackets] with your own detail. Prompts marked **SYNTHETIC DATA** use the trainer-provided files — never live portfolio or MNPI data.

0 · The C.G.S.E prompting frame

- **Context** — who you are and the situation: “I am an investment analyst preparing for Thursday's IC...”
- **Goal** — the specific output: “...draft a one-page recommendation memo...”
- **Source** — what to ground on: “...using /ManagerRFP.xlsx and /IC-minutes...” (the / picker attaches files)
- **Expectation** — format, length, tone: “...answer-first, 5 bullets max per section, formal PNB tone.”

1 · Copilot Chat

Web tab — market knowledge (no work data, no MNPI)

CHAT · WEB

I am an investment analyst at a Malaysian asset manager. Explain how rising US rates typically affect emerging-market utility valuations, in 5 bullets, then list 3 metrics I should watch this quarter.

Why it works: Context + a tight, countable output format.

CHAT · WEB

Compare active vs passive external manager mandates for an institutional investor: fees, tracking error, governance oversight. Give a balanced table I can adapt for an internal note.

Work tab — grounded in your tenant

CHAT · WORK · SYNTHETIC DATA

Summarise the investment thesis and top risks in this note in 5 bullets, with the rating and price target. Flag any assumption that looks aggressive versus consensus. /[BrokerNote.pdf]

Why it works: Session 1 drill — same question as the web tab, different grounding; compare the answers.

CHAT · WORK

Find the last ESG note on [manager name] shared with me, tell me who sent it and when, and summarise its conclusion in 3 bullets with a link to the file.

Why it works: Enterprise search across mail, Teams and SharePoint in one prompt.

2 · Copilot in Word

WORD · DRAFT · SYNTHETIC DATA

Draft a 1-page Investment Committee recommendation memo on the external manager selection, using /[ManagerRFP_Analysis.xlsx] and /[RFP_Evaluation_Criteria.docx]. Structure: Recommendation (answer first), Rationale (3 bullets), Key risks (3 bullets), Fees & terms, Next steps. Formal PNB tone.

Why it works: Minto Pyramid — answer first; Source via the / picker; explicit structure.

WORD • REWRITE

Rewrite this section for the Investment Committee: more concise, active voice, keep all figures unchanged, maximum 150 words.

WORD • REVIEW

Act as a sceptical IC member. List the 5 hardest questions this memo would face, and note where the memo already answers them or where I have a gap.

3 • Copilot in Excel

EXCEL • ANALYSE • SYNTHETIC DATA

Analyse this table of 8 fund managers; rank by 3-year return net of fees; flag missing fields and outliers; then add a column showing each manager's fee as bps of AUM.

Why it works: Session 2 opener on the RFP workbook — data must be formatted as an Excel table first.

EXCEL • SCENARIO

If management fees were capped at 60 bps for all managers, how does the net-of-fees ranking change? Show before and after side by side.

EXCEL • VISUALISE

Create a chart comparing 3-year annualised return (net) against tracking error for the 8 managers, and highlight the two on the recommended shortlist.

4 • Copilot in PowerPoint

POWERPOINT • CREATE • SYNTHETIC DATA

Create a 5-slide IC screening presentation from /[IC_Recommendation_Memo.docx]: 1 Recommendation, 2 Shortlist comparison, 3 Performance & fees, 4 Risks & mitigations, 5 Next steps. Add concise speaker notes for each slide.

Why it works: Chart method for live sessions: let Copilot regenerate charts from the data — fewer failure points than copy-linking.

POWERPOINT • REFINE

Rewrite slide 3 so each bullet is under 8 words; move the detail to the speaker notes.

POWERPOINT · SUMMARISE

Summarise this deck into one executive summary slide for the PGCE office, answer-first.

5 · Copilot in Outlook

OUTLOOK · DRAFT

Draft a follow-up email to [PM name] on today's IC decisions: confirm the two managers shortlisted, list the three action items with owners and due dates, and ask for sign-off on the site-visit dates. Professional, concise, my usual tone.

OUTLOOK · SUMMARISE

Summarise this email thread on the [mandate name] RFP: what has been agreed, what is still open, and what am I being asked to do by when?

OUTLOOK · COACH

Review my draft before I send it to the external manager: flag anything that could read as a commitment we have not made, and suggest a firmer closing line.

6 · Copilot in Teams

TEAMS · RECAP

Summarise this meeting; list decisions and action items with owners and due dates. What was agreed on the external manager shortlist, and what questions were left open?

Why it works: Works live in-meeting or on the recap afterwards.

TEAMS · CATCH UP

I joined 20 minutes late — what did I miss, and was anything assigned to me?

TEAMS · CHANNEL

Summarise the last 7 days of the [Investments – External Managers] channel: key updates, unresolved questions, and files shared.

7 · Researcher agent

Researcher plans multi-step research over the web and your work content, asks clarifying questions, and returns a cited brief. Budget ~15–20 minutes; review its plan before it runs.

RESEARCHER

Research 12-month global proxy voting and stewardship trends in the plantation and energy sectors; compare with PNB's published Voting Guidelines; give implications for our engagement priorities — with sources.

Why it works: Session 4 core prompt. Verify citations against PNB's public stewardship pages.

RESEARCHER

Prepare an external-manager due-diligence brief on [manager]: firm ownership and AUM trend, flagship strategy performance vs benchmark, key-person changes in 24 months, regulatory actions, ESG credentials. Cite every claim; separate facts from press commentary.

RESEARCHER

Build a market backdrop note for the Q3 IC: Malaysian equity and sukuk market performance, foreign flows, and 3 consensus themes for the next 12 months — with sources and a one-paragraph 'so what' for a long-term institutional investor.

8 • Analyst agent

Analyst reasons step-by-step, writes and runs Python on your data, and shows its working. Always open the code/working tab before trusting a number.

ANALYST • SYNTHETIC DATA

Analyse this portfolio workbook; show top and bottom 5 contributors to YTD return; then model rates +100bps and MYR –5% vs USD on the fixed-income sleeve, with charts and your assumptions listed.

Why it works: Session 5 core prompt on the holdings workbook.

ANALYST • SYNTHETIC DATA

Using the fund-manager RFP workbook, run a sensitivity analysis: how does the shortlist change under (a) equal weighting of return and risk, (b) 2× weight on fees, (c) excluding managers with ESG rating below BBB? Show a table per case.

ANALYST • SYNTHETIC DATA

Forecast 12-month dividend income for this portfolio assuming current yields hold and no rebalancing; then show the downside case if the top 3 dividend payers cut payouts by 20%. Chart both paths.

9 • Agent Builder — PNB Investment Knowledge Assistant

Build path: Copilot Chat → Agents → Create agent → Configure tab. Add knowledge, paste the instructions, add starters, test, then share.

Name

FIELD

PNB Investment Knowledge Assistant

Description

FIELD

Answers questions about past Investment Committee decisions, house views and deal history — grounded only in the IC papers library, always with citations.

Instructions (paste in full)

INSTRUCTIONS

You are the PNB Investment Knowledge Assistant, supporting investment analysts at Permodalan Nasional Berhad. You answer questions about past Investment Committee (IC) decisions, house views, manager assessments and deal history. RULES: (1) Answer ONLY from the IC papers provided as your knowledge source. Do not use general knowledge or the web. (2) Cite the source document (title and date) for every answer. (3) If the answer is not in the papers, say: 'I cannot find this in the IC papers provided' — never guess or extrapolate. (4) Where papers conflict, present both positions with their dates and note the more recent one. (5) Keep answers concise: a direct answer first, then supporting detail in bullets. (6) You provide information retrieval only — never investment advice or recommendations for new decisions. (7) Use formal, neutral language consistent with PNB documentation.

Knowledge

- Production: the SharePoint library of past IC papers (agree an owner for the source).
- Training: the 3 sample IC papers (PDF) provided by the trainer.
- Untick web grounding — the refusal rule only works if the papers are the sole source.

Conversation starters

- What did the IC decide on [sector / company / manager] and when?
- Summarise our house view on [asset class] from the most recent paper.
- Which papers discuss [theme, e.g. data-centre exposure], and what was concluded?

Test prompts (run before sharing)

TEST 1 • GROUNDED ANSWER

What did the IC conclude on the external manager shortlist, and which paper says so?

TEST 2 • REFUSAL CHECK

What is PNB's view on cryptocurrency allocation?

Why it works: Correct behaviour: it declines — the topic is not in the sample papers. If it answers, web grounding is still on or the instructions were shortened.

TEST 3 · CITATION CHECK

Summarise our house view on Malaysian REITs in 3 bullets, citing the paper title and date.

Appendix · Public documents for training

All public and verified as live in July 2026 — real PNB-domain material participants can relate to. Re-check links shortly before the session.

- **PNB Integrated Report 2025 (English, PDF)** — Latest full report — LEAP-6, AUM RM365.3bn, sustainability & stewardship chapters. Researcher grounding + summarisation drills.
<https://www.pnb.com.my/sites/default/files/2026-07/PNB%20IAR%202025%20%E2%80%93%20English.pdf>
- **PNB Integrated Report 2024 (English, PDF)** — Prior-year report — useful as a second document for comparison prompts (“what changed year-on-year?”).
<https://www.pnb.com.my/sites/default/files/2025-06/PNB%20IR2024%20%28English%29.pdf>
- **Domestic Voting Guidelines of PNB (PDF)** — Core source for the Session 4 stewardship brief and a strong agent-knowledge document.
https://www.pnb.com.my/themes/pnb/assets/pdf/Domestic%20Voting%20Guideline%20of%20PNB%20Part%201_Hiress%201.pdf
- **International Voting Guidelines of PNB (PDF)** — Companion to the domestic guidelines — global voting-trends comparison.
https://www.pnb.com.my/themes/pnb/assets/pdf/International%20Voting%20Guideline%20of%20PNB_Hiress.pdf
- **PNB Stewardship Report (PDF)** — Engagement approach, escalation matrix, proxy-voting philosophy.
<https://www.pnb.com.my/themes/pnb/assets/pdf/PNB%20Stewardship%20Report.pdf>
- **PNB Board Charter (PDF)** — Governance Q&A document — good third file for the knowledge-agent build.
<https://www.pnb.com.my/themes/pnb/assets/pdf/board-charter.pdf>
- **Historical proxy voting decisions (2019–2022)** — Interactive record of PNB votes with rationale — demo of real voting data.
<https://www.pnb.com.my/themes/pnb/assets/HistoricalProxyVoting/index.html>
- **Live proxy-voting dashboard (Glass Lewis Viewpoint)** — Current votes ahead of general meetings — cite in the Session 4 brief.
<https://viewpoint.glasslewis.com/WD/?siteId=PNB>
- **Sustainability policies hub** — Sustainability Framework, Net Zero Portfolio, Nature & Biodiversity Policy PDFs — ESG assessment exercises.
<https://www.pnb.com.my/en/sustainability-overview-en>
- **Annual Report page (all years)** — Index of every PNB Integrated Report 2017–2025 with PDF downloads.
<https://www.pnb.com.my/en/reports-en>
- **ASNB — fund reports & prospectuses** — Fund-level annual reports for unit-trust flavoured exercises.
<https://www.asnb.com.my/>
- **Bursa Malaysia company announcements** — Pull annual reports of PNB strategic companies (search Sime Darby, S P Setia, SD Guthrie, MIDF) as stand-ins for company/broker notes.
https://www.bursamalaysia.com/market_information/announcements/company_announcement

Tip: download the PDFs before the session and place them in a Training SharePoint/OneDrive folder — the / picker and Agent Builder knowledge step both need the files in-tenant.