Fundamentals of Investment Management: A Comprehensive Guide

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Orlando, Florida (USA)



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Why This Course

Investment management is essential for making informed financial decisions, building diversified portfolios, managing risk, and achieving long-term financial objectives. In a constantly changing market environment, finance professionals need a strong understanding of financial markets, asset classes, portfolio theory, valuation methods, risk tools, and performance evaluation techniques.

Effective investment management is not only about choosing assets. It requires clear investment objectives, disciplined asset allocation, risk-return analysis, portfolio construction, continuous monitoring, and the ability to adapt to changing market conditions. Professionals must also understand emerging trends such as ESG investing, sustainable finance, fintech, and alternative investments.

This comprehensive 1-week course provides participants with a strong foundation in investment management principles and practices. Through practical exercises, portfolio analysis, valuation activities, risk assessment tools, and case studies, participants will learn how to make informed investment decisions and manage portfolios more effectively.

What You'll Learn and Practice

By joining this program, you will:

- Understand the fundamentals of investment management and financial markets.
- Identify key financial instruments and their investment characteristics.
- Understand the investment management process and the role of key market participants.
- Apply risk and return concepts in investment decision-making.
- Use time value of money and investment mathematics.
- Apply Modern Portfolio Theory and efficient frontier concepts.
- Develop asset allocation and portfolio construction skills.
- Use diversification strategies to manage portfolio risk.
- Understand the Capital Asset Pricing Model.
- Analyze equity and fixed income investments.
- Apply bond pricing, yield curve analysis, duration, and convexity.
- Use risk measures such as Value at Risk.
- Explore derivatives, hedging strategies, and alternative investments.
- Evaluate investment performance using benchmarks and attribution methods.
- Understand ESG investing, sustainable finance, fintech, and emerging investment trends.



The Program Flow

Day 1: Introduction to Investment Management

- Overview of financial markets and instruments.
- Understanding equities, bonds, money market instruments, funds, derivatives, and alternative assets.
- Investment management process and key players.
- Investors, asset managers, brokers, custodians, regulators, and advisors.
- Fundamentals of risk and return.
- Time value of money and investment mathematics.
- Practical exercise: Comparing asset classes based on risk, return, liquidity, and investment purpose.

Day 2: Asset Allocation and Portfolio Theory

- Modern Portfolio Theory and efficient frontier.
- Understanding portfolio risk, expected return, and correlation.
- Strategic and tactical asset allocation.
- Diversification strategies.
- Building portfolios based on objectives, constraints, and risk appetite.
- Capital Asset Pricing Model.
- Workshop: Constructing a diversified portfolio using asset allocation principles.

Day 3: Equity and Fixed Income Investments

- Equity valuation methods.
- Dividend discount models, price multiples, and fundamental analysis.
- Bond pricing and yield curves.
- Understanding interest rate movements and bond valuation.
- Duration and convexity.
- Fixed income portfolio strategies.
- Practical exercise: Evaluating equity and fixed income investment opportunities.

Day 4: Risk Management and Alternative Investments

- Value at Risk and other risk measures.
- Measuring and monitoring investment risk.
- Derivatives and hedging strategies.
- Using futures, options, and swaps for risk management.
- Introduction to alternative investments.
- Real estate and commodities in portfolios.
- Workshop: Developing a portfolio risk management and hedging approach.



Day 5: Performance Evaluation and Emerging Trends

- Performance measurement and attribution.
- Understanding absolute return, relative return, alpha, beta, tracking error, and Sharpe ratio.
- Benchmark selection and construction.
- ESG investing and sustainable finance.
- Fintech and the future of investment management.
- Emerging trends shaping portfolio management and investment decision-making.
- Final activity: Presenting an investment portfolio strategy and performance evaluation.

Individual Impact

- Strengthen your understanding of investment management and financial markets.
- Improve your ability to construct and manage diversified portfolios.
- Build practical skills in asset allocation, valuation, and risk assessment.
- Enhance your ability to evaluate investment performance.
- Gain insight into alternative investments and emerging market trends.
- Develop stronger confidence in making informed investment decisions.

Work Impact

- Improve investment decision quality and portfolio construction practices.
- Strengthen risk management and performance evaluation capabilities.
- Support better alignment between investment strategies and financial objectives.
- Improve communication of investment recommendations to stakeholders.
- Enhance understanding of ESG, sustainable finance, fintech, and alternative assets.
- Build stronger institutional capability in portfolio management and investment analysis.

Training Methodology

This program uses a practical and finance-focused approach to help participants apply investment management concepts to real market situations. Learning methods include:

- Interactive discussions and guided facilitation.
- Investment management case studies.
- Risk and return calculation exercises.
- Asset allocation and portfolio construction workshops.
- Equity and fixed income valuation activities.
- Risk management and hedging scenarios.
- Performance measurement and attribution exercises.
- ESG, fintech, and emerging trend discussions.
- Group work, peer feedback, and practical portfolio presentations.



Beyond the Course

Upon completion, participants will be prepared to manage investment decisions and portfolio strategies with greater confidence and discipline. They will return ready to:

- Construct and manage diversified investment portfolios.
- Evaluate and mitigate investment risks effectively.
- Analyze equity and fixed income opportunities.
- Measure and explain portfolio performance.
- Apply asset allocation principles to different investment objectives.
- Understand emerging trends shaping the investment management industry.

