

Fundamentals of Investment Management: A Comprehensive Guide

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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.

A graphic of a chessboard with several chess pieces (king, queen, rook, knight, and pawns) in gold and silver. The text 'UK Training PARTNER' is overlaid on the board.

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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.

The graphic features the text 'UK Training' in a small, grey, sans-serif font above the word 'PARTNER' in a large, bold, black, sans-serif font. This text is positioned over a background of concentric grey circles and a chessboard pattern. In the bottom right corner, there are three chess pieces: a gold king, a silver pawn, and a silver knight, all rendered in a realistic style with shadows.

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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.

A graphic of a chessboard with several chess pieces (a king, a queen, and a pawn) in gold and silver, set against a background of concentric circles.

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