

Active Portfolio Management and Asset Allocation Mastery

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Barcelona (Spain)

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Day 3: Tactical Asset Allocation and Risk Management

- Market timing and tactical shifts
- Risk budgeting and portfolio optimization
- Implementing effective hedging strategies
- Value at Risk VaR and other risk metrics

Day 4: Performance Evaluation and Attribution

- Key performance indicators Sharpe ratio, alpha, beta
- Benchmark selection and relative performance
- Attribution analysis techniques
- Evaluating risk-adjusted returns

Day 5: Advanced Topics in Portfolio Management

- Factor-based investing strategies
- Quantitative portfolio construction techniques
- Behavioral finance and its impact on decision-making
- Emerging trends in active management AI, machine learning

Practical Wins for Participants

- Develop a comprehensive active management framework tailored to their investment mandates
- Create and implement strategic asset allocation plans aligned with client objectives
- Enhance risk management capabilities to protect portfolios in volatile markets
- Improve performance evaluation and client reporting processes

A graphic of a chessboard with several chess pieces (king, queen, rook, knight, and pawns) in gold and silver. The board is checkered and has a subtle grid pattern. In the bottom left corner, there is a solid gold square.

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