

Investment portfolio management

7 – 11 June 2027

Boston, Massachusetts (USA)

UK Training

PARTNER



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Ref: 3254270_163407 **Date:** 7 – 11 June 2027 **Location:** Boston, Massachusetts (USA) **Fees:** 5900 GBP

Introduction

The Advanced Investment Management course is a comprehensive and intensive training program designed to equip participants with the most up-to-date knowledge and advanced skills in investment portfolio management. This course delves into the rapidly evolving landscape of investment strategies, portfolio management techniques, and the integration of technology in investment decision-making. Participants will gain a deep understanding of contemporary investment portfolio management concepts and practices, enabling them to navigate the complexities of modern financial markets with confidence and expertise.

By understanding what is investment portfolio management and exploring various types of investment portfolio management, participants will be able to optimize their portfolios and achieve their financial goals in dynamic market conditions.

Course Objectives

By the end of this course, participants will:

- Gain a comprehensive understanding of modern investment portfolio management concepts and their relationship with savings in the digital era.
- Explore advanced investment portfolio management strategies and their applications in different market conditions.
- Examine the evolving role of technology in investment portfolio management and decision-making.
- Analyze the impact of macroeconomic factors on investment strategies.
- Develop proficiency in building and managing advanced investment portfolios.
- Learn cutting-edge investment portfolio analysis techniques and evaluation methods.
- Understand the principles and criteria for selecting stocks and navigating dynamic markets.
- Explore the use of alternative investments and their role in portfolio diversification.
- Evaluate the performance and risks associated with modern investment approaches.
- Apply advanced financial modeling techniques to assess investment opportunities.
- Use quantitative methods to measure and manage portfolio risk.

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A graphic illustration of a chessboard with several chess pieces. A large gold king piece is prominent in the foreground, with a silver pawn and a gold pawn nearby. The board is checkered, and there are concentric circles in the background.

Course Outlines

Day 1: Introduction to Modern Investment Management

- Relationship between investment and savings in the digital era.
- Advanced concepts of the time value of money.
- Role of technology and innovation in investment portfolio management.

Day 2: Modern Investment Strategies

- Active vs. passive investing.
- Factor investing and smart beta strategies.
- Sustainable investing:
 - Environmental, social, and governance ESG investing.
 - Impact investing and sustainable finance.

Day 3: Integration of Technology in Investment Management

- Artificial intelligence and machine learning in portfolio optimization.
- Big data and predictive analytics in investment decision-making.
- Macroeconomic factors and investment strategies:
 - Analysis of macroeconomic factors.
 - Global market trends and geopolitical risks.

Day 4: Behavioral Finance and Investor Psychology

A graphic of a chessboard with several chess pieces (a king, a queen, and a pawn) on it. The text 'UK Training' is written in a small font above the word 'PARTNER' in a large, bold, sans-serif font.

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- Understanding investor behavior and psychological biases in investment decision-making.
- Advanced investment portfolio construction and risk management:
 - Portfolio construction strategies.
 - Risk management techniques.

Day 5: Advanced Investment Analysis Techniques

- Fundamental and technical analysis.
- Quantitative methods for risk measurement and management.
- Alternative investments and portfolio diversification:
 - Introduction to alternative investments.
 - Role of alternative investments in diversification.
- Performance evaluation and attribution analysis:
 - Performance evaluation techniques.
 - Attribution analysis and benchmarking.

Why Attend this Course: Wins & Losses!

- Gain a robust understanding of investment portfolio management, including its definition and meaning.
- Learn how to build an investment portfolio and optimize it using advanced investment portfolio management strategies.
- Develop skills in investment portfolio analysis and performance evaluation.
- Understand equity investment portfolio management and how to navigate dynamic financial markets.
- Master the use of technology in investment portfolio optimization.
- Create effective investment portfolio planning for long-term success.
- Prepare to become a proficient investment portfolio analyst.

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Conclusion

By the end of this course, participants will have a robust understanding of investment portfolio management, including its definition and meaning. They will be equipped with the skills to build an investment portfolio, analyze its performance, and optimize it for various market conditions.

Participants will also learn how to develop an effective investment portfolio plan, ultimately becoming proficient investment portfolio analysts capable of navigating the complexities of modern investment landscapes.

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

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