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# Managing Equity Portfolios

5 – 9 April 2027
Orlando, Florida (USA)



# Managing Equity Portfolios

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## Introduction

In today's dynamic and often unpredictable financial environment, Managing Equity Portfolios has become a core competency for professionals and institutions aiming to maximize returns, control risk, and align investment decisions with strategic goals.

Whether you're a C-suite executive, a finance manager, or a mid-career analyst working in sectors such as oil and gas, government, telecommunications, banking, or project management, understanding how to effectively manage equity portfolios is key to driving institutional performance and ensuring long-term value creation.

This course empowers participants with modern tools and frameworks to build, monitor, and optimize stock portfolios in both developed and emerging markets, particularly within the Middle East and North Africa MENA region.

## Course Objectives

- Understand the foundational principles of equity portfolio management.
- Analyze risk-return profiles and align portfolios with investor goals.
- Apply equity valuation models e.g., DCF, multiples-based models.
- Utilize diversification strategies and modern portfolio theory.
- Monitor portfolio performance and adjust asset allocations effectively.
- Evaluate the impact of macroeconomic policies and market volatility.
- Use advanced digital tools for investment decision-making.
- Examine real-world equity portfolios—successes and failures.

## Course Outlines

### Day 1: Introduction to Financial Markets and Portfolio Concepts

- Overview of equity markets and instruments.
- Institutional vs. individual portfolio objectives.
- Definitions of return, risk, and their measurements.
- Behavioral finance and investor biases.
- Aligning portfolio design with risk appetite and strategic goals.
- Practical activity: Analyze an existing portfolio sample.



## Day 2: Equity Analysis Techniques and Investment Selection

- Fundamental vs. technical analysis in equity research.
- Tools and models for stock valuation.
- Financial ratios and performance indicators P/E, ROE, EPS.
- Economic indicators and their impact on stock prices.
- Sector analysis and market timing.
- Group workshop: Compare two listed companies' equity potential.

## Day 3: Portfolio Construction and Diversification Management

- Portfolio design and structuring approaches.
- Diversification principles to minimize unsystematic risk.
- Applying Modern Portfolio Theory Markowitz model.
- Sectoral and geographic asset allocation strategies.
- Tools for ongoing performance tracking.
- Workshop: Design a mock portfolio for a simulated investor case.

## Day 4: Risk Management and Dynamic Rebalancing

- Understanding Value at Risk VaR and scenario analysis.
- Hedging techniques using financial derivatives.
- Dynamic portfolio rebalancing approaches.
- Dealing with market shocks and drawdowns.
- Tools and software for risk and performance analytics.
- Simulation: Crisis scenario and live portfolio reallocation.

## Day 5: Final Integration and Performance Review

- Recap of all core portfolio concepts and strategies.
- Case study: Corporate shift in investment strategy.
- Capstone project: Build and present a full portfolio strategy.
- Final assessment: Portfolio evaluation and optimization test.
- Presentation of certificates and peer feedback.
- Open discussion: Region-specific challenges and future trends.



## Why Attend this Course: Wins & Losses!

- Gain practical tools and ready-to-use models for managing real portfolios.
- Improve your investment decision-making and financial leadership.
- Understand local and global market dynamics more deeply.
- Increase returns and reduce exposure through smarter diversification.
- Build expertise in equity valuation and risk analytics.
- Earn a recognized certification to enhance your career.
- Network with other professionals and portfolio managers.
- Stay up to date with global best practices and investment trends.

## Conclusion

In markets marked by uncertainty and evolving economic shifts, Managing Equity Portfolios stands as a vital professional skill. From corporate treasuries to private investment offices, effective portfolio management ensures that capital is not only protected—but multiplied.

**This course blends technical knowledge with real-world practice to equip participants with the tools, insights, and confidence to build resilient, high-performing portfolios. Whether you're responsible for internal investment strategy or external client portfolios, the skills gained here will drive smarter decisions and measurable outcomes.**

