

## Investment portfolio management

*Lisbon (Portugal)*

*25 - 29 November 2024*

UK Training

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## Investment portfolio management

Code: FA28 From: 25 - 29 November 2024 City: Lisbon (Portugal) Fees: 4400 Pound

### 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 concepts and practices, enabling them to navigate the complexities of modern financial markets with confidence and expertise.

### Course Objectives

- Gain a comprehensive understanding of modern investment 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 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.

### 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.

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

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### 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

- 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.

### 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.

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