

Comprehensive Portfolio Management: Strategies,  
Techniques, and Tools

*Lisbon (Portugal)*

*17 - 21 February 2025*

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# Comprehensive Portfolio Management: Strategies, Techniques, and Tools

Code: FA28 From: 17 - 21 February 2025 City: Lisbon (Portugal) Fees: 4400 Pound

## Introduction

This comprehensive course provides a deep understanding of Portfolio Management, equipping participants with the tools, techniques, and frameworks necessary for constructing and managing investment portfolios. The course is designed for both beginners and professionals, covering essential topics such as modern portfolio theory, asset allocation, performance evaluation, and risk management.

## Course Objectives

- Understand the fundamentals of portfolio management.
- Apply Modern Portfolio Theory MPT in portfolio construction.
- Implement both active and passive portfolio management strategies.
- Evaluate and optimize portfolio performance.
- Integrate effective risk management strategies.
- Utilize financial tools and software for portfolio management.

## Course outlines

### Day 1: Introduction to Portfolio Management

- Fundamentals of risk and return.
- The role of diversification in portfolio construction.

### Day 2: Modern Portfolio Theory MPT & Efficient Frontier

- Introduction to Modern Portfolio Theory.
- The Capital Market Line CML and Capital Asset Pricing Model CAPM.

### Day 3: Asset Allocation and Risk Management

- Strategic vs. tactical asset allocation.
- Risk management in portfolio management.
- Building a diversified portfolio.

### Day 4: Performance Evaluation and Benchmarking

- Key performance metrics.
- Benchmarking and comparative analysis.
- Behavioral factors in portfolio performance.

A graphic of a chessboard with several chess pieces (a king, a pawn, and a knight) on it, set against a background of concentric circles. The text 'UK Training PARTNER' is overlaid on the right side of the board.

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## Day 5: Advanced Topics in Portfolio Management & Real-World Applications

- Alternative investments and portfolio construction.
- ESG Environmental, Social, and Governance investing.
- Technology in portfolio management.

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