

Portfolio Management: Modern Strategies for Optimal Returns

Amsterdam (Netherlands)

17 - 21 February 2025

UK Training

PARTNER



Portfolio Management: Modern Strategies for Optimal Returns

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Introduction

The field of portfolio management has evolved significantly in recent years, driven by technological advancements, shifts in global financial markets, and the rise of new investment opportunities. This five-day course on Advanced Portfolio Management is designed for professionals looking to enhance their understanding of portfolio management concepts and apply advanced strategies for optimizing portfolio performance. Whether you're a seasoned portfolio manager or a financial professional seeking to improve your skills, this course will provide you with the latest tools and techniques to manage and grow investment portfolios effectively.

You will explore modern portfolio management strategies, global portfolio management, and cutting-edge investment approaches such as sustainable investing and the use of artificial intelligence in portfolio construction. By the end of this course, you will gain comprehensive insights into portfolio management services, project portfolio management, and how to maximize returns while managing risks in a rapidly changing market environment.

Course Objectives

- Understand the principles of Modern Portfolio Theory MPT and its limitations in today's dynamic market environment.
- Learn advanced portfolio construction techniques, including alternative investments, factor-based models, and risk management strategies.
- Explore the challenges of managing global portfolios amidst market volatility, geopolitical risks, and disruptive technologies.
- Gain expertise in factor investing, implementing factor-based portfolio strategies to enhance performance.
- Understand the implications of behavioral finance in portfolio decision-making and how to mitigate cognitive biases.
- Dive into sustainable and socially responsible investing SRI and the integration of ESG Environmental, Social, and Governance factors into portfolio management.
- Learn how artificial intelligence, machine learning, and big data analytics can optimize portfolio construction and performance evaluation.
- Explore the best practices for portfolio monitoring, performance evaluation, and rebalancing.
- Understand the complexities of currency risk management, international diversification, and global portfolio management strategies.

Course Outlines

Day 1: Modern Portfolio Theory and its Limitations

- Introduction to Modern Portfolio Theory MPT and its foundational principles
- Efficient frontier and the concept of diversification
- Capital Asset Pricing Model CAPM

The logo for UK Training Partner features the text 'UK Training' in a small, black sans-serif font above the word 'PARTNER' in a large, bold, black sans-serif font. The text is positioned over a background of a chessboard with several chess pieces (a king, a pawn, and a knight) and a series of concentric white circles radiating from behind the pieces.

- Limitations of MPT in today's complex financial environment
- Case studies and practical examples of portfolio performance

Day 2: Advanced Portfolio Construction Techniques

- Role of alternative investments in portfolio diversification
- Factor-based models and the emerging trend of smart beta strategies
- Risk management techniques: Value at Risk VaR and Conditional Value at Risk CVaR
- Advanced portfolio optimization techniques for improving returns
- Practical applications and hands-on portfolio construction exercises

Day 3: Navigating Market Volatility and Disruptive Technologies

- Managing portfolio risks in volatile and uncertain markets
- Strategies for downside protection and tail-risk hedging
- The impact of disruptive technologies such as blockchain and artificial intelligence AI on portfolio management
- Real-world case studies highlighting portfolio adjustments in response to technology trends

Day 4: Factor Investing and Sustainable Investing

- Understanding factor investing and the various factor models
- Implementing factor-based strategies to improve portfolio performance
- Introduction to sustainable investing and socially responsible investing SRI
- How to integrate ESG Environmental, Social, Governance criteria into portfolio management
- Examining the growing importance of sustainability in global portfolio management

Day 5: Advanced Techniques and Global Portfolio Management

- The role of artificial intelligence, machine learning, and big data analytics in portfolio management
- How behavioral finance influences portfolio decision-making and how to avoid biases
- International diversification and currency risk management in global portfolio management
- Techniques for portfolio monitoring, evaluating performance, and implementing rebalancing strategies
- Case studies on best managed portfolios and lessons learned from global investment strategies

Conclusion

By the end of this course, participants will have acquired advanced skills in project portfolio management, technology portfolio management, and the best practices for portfolio management in an increasingly complex global market. Whether you're seeking to gain a portfolio manager certification or enhance your expertise in global portfolio management, this course will provide you with the necessary tools to succeed. Portfolio management skills and strategic portfolio management are essential for maximizing investment returns and managing risk, especially in volatile and unpredictable markets.

Participants will receive a certification in advanced portfolio management upon successful completion of the course. This certification demonstrates your ability to manage a portfolio effectively and stay ahead in a competitive financial landscape.

A graphic of a chessboard with several chess pieces (a king, a queen, a rook, and a pawn) 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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