

Portfolio Management: Modern Strategies for Optimal Returns

Orlando, Florida (USA)

3 - 7 November 2025

UK Training

PARTNER



Portfolio Management: Modern Strategies for Optimal Returns

Code: FA28 From: 3 - 7 November 2025 City: Orlando, Florida (USA) Fees: 5700 Pound

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 Portfolio Management 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 portfolio manager 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.

The logo for UK Training Partner features the text 'UK Training' in a smaller font above the word 'PARTNER' in a large, bold, black font. The background of the logo is a stylized chessboard with several chess pieces, including a king, a queen, and a pawn, arranged in a strategic formation.

- Capital Asset Pricing Model CAPM.
- Limitations of MPT in today's complex financial environment.
- Case studies and practical examples of best managed portfolios.

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.

Why Attend this Course: Wins & Losses!

- Gain a deep understanding of what is portfolio management and how to apply it to diverse financial environments.
- Learn the benefits of project portfolio management training and how to align project investments with organizational goals.
- Enhance your qualifications with portfolio manager certifications recognized globally.
- Develop advanced portfolio manager skills to manage both financial and property portfolio management.
- Master the integration of technology portfolio management techniques for modern investment strategies.
- Understand what is product portfolio management and how it complements financial portfolio management.

Conclusion

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

UK Training
PARTNER



By the end of this course, participants will have acquired advanced skills in project portfolio management, technology portfolio management, and 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 pawns. A large gold king piece is prominent in the foreground, with other pawns in gold and silver behind it. The board has a checkered pattern, and there are concentric circles in the background.

UK Training
PARTNER

Head Office: +44 7480 775 526
Email: Sales@blackbird-training.com
Website: www.blackbird-training.com

Blackbird Training Cities

Europe



Malaga (Spain)



Sarajevo (Bosnia and Herzegovina)



Oporto (Portugal)



Glasgow (Scotland)



Edinburgh (UK)



Oslo (Norway)



Annecy (France)



Bordeaux (France)



Copenhagen (Denmark)



Birmingham (UK)



Lyon (France)



Moscow (Russia)



Stockholm (Sweden)



Podgorica (Montenegro)



Batumi (Georgia)



Salzburg (Austria)



London (UK)



Istanbul (Turkey)



Amsterdam



Düsseldorf (Germany)



Paris (France)



Athens (Greece)



Barcelona (Spain)



Munich (Germany)



Geneva (Switzerland)



Prague (Czech)



Vienna (Austria)



Rome (Italy)



Brussels (Belgium)



Madrid (Spain)



Berlin (Germany)



Lisbon (Portugal)



Zurich (Switzerland)



Manchester (UK)



Milan (Italy)



Blackbird Training Cities

USA & Canada



Los Angeles (USA)



Orlando, Florida (USA)



Online



Phoenix, Arizona (USA)



Houston, Texas (USA)



Boston, MA (USA)



Washington (USA)



Miami, Florida (USA)



New York City (USA)



Seattle, Washington (USA)



Washington DC (USA)



In House



Jersey, New Jersey (USA)



Toronto (Canada)

ASIA



Baku (Azerbaijan)
(Thailand)



Maldives (Maldives)



Doha (Qatar)



Manila (Philippines)



Bali (Indonesia)



Bangkok



Beijing (China)



Singapore (Singapore)



Sydney



Tokyo (Japan)



Jeddah (KSA)



Riyadh (KSA)



Melbourne (Australia)
(Kuwait)



Phuket (Thailand)



Shanghai (China)



Dubai (UAE)



Kuala Lumpur (Malaysia)



Kuwait City



Seoul (South Korea)



Pulau Ujong (Singapore)



Irbid (Jordan)



Jakarta (Indonesia)



Amman (Jordan)



Beirut

UK Training
PARTNER

Blackbird Training Cities

AFRICA



Kigali (Rwanda)



Cape Town (South Africa)



Accra (Ghana)



Lagos (Nigeria)



Marrakesh (Morocco)



Nairobi (Kenya)



Zanzibar (Tanzania)



Tangier (Morocco)



Cairo (Egypt)



Sharm El-Sheikh (Egypt)



Casablanca (Morocco)



Tunis (Tunisia)



Blackbird Training Clients

 <p>MANNAI CORPORATION MANNAI Trading Company WLL, Qatar</p>	 <p>GAC UNE FILIALE D' EGA Alumina Corporation Guinea</p>	 <p>Booking.com Booking.com Netherlands</p>	 <p>OXFAM Oxfam GB International Organization, Yemen</p>	 <p>Capital Markets Authority Kuwait</p>
 <p>WS Waltersmith Petroman Oil Limited Nigeria</p>	 <p>QNB Qatar National Bank (QNB), Qatar</p>	 <p>Qatar Foundation Qatar</p>	 <p>AFRICAN UNION ADVISORY BOARD ON CORRUPTION Tanzania</p>	 <p>KFAS Kuwait Foundation for the Advancement of Sciences KFAS Kuwait</p>
 <p>Reserve Bank of Malawi Malawi</p>	 <p>Central Bank of Nigeria Nigeria</p>	 <p>Ministry of Interior Kingdom of Saudi Arabia Ministry of Interior, KSA</p>	 <p>Mabruk Oil Company Libya</p>	 <p>Saudi Electricity Company KSA</p>
 <p>BPKH Badan Pengelola Keuangan Haji BADAN PENGELOLA KEUANGAN Haji, Indonesia</p>	 <p>NATO Italy</p>	 <p>ENI ENI CORPORATE UNIVERSITY, Italy</p>	 <p>GULF BANK Gulf Bank Kuwait</p>	 <p>General Organization for Social Insurance KSA</p>
 <p>Defence Space Administration Nigeria</p>	 <p>National Industries Group (Holding) Kuwait</p>	 <p>Hamad Medical Corporation Qatar</p>	 <p>USAID Pakistan</p>	 <p>STC STC Solutions, KSA</p>
 <p>North Oil Company North Oil company,</p>	 <p>EKO Electricity</p>	 <p>OMAN BROADBAND Oman Broadband</p>	 <p>UNITED NATIONS UN.</p>	 <p>Authority for Electricity Regulation, Oman Authority for</p>

UK Training
PARTNER

Blackbird Training Categories

Management & Admin

Entertainment & Leisure
Professional Skills
Finance, Accounting, Budgeting
Media & Public Relations
Project Management
Human Resources
Audit & Quality Assurance
Marketing, Sales, Customer Service
Secretary & Admin
Supply Chain & Logistics
Management & Leadership
Agile and Elevation

Technical Courses

Artificial Intelligence (AI)
Hospital Management
Public Sector
Special Workshops
Oil & Gas Engineering
Telecom Engineering
IT & IT Engineering
Health & Safety
Law and Contract Management
Customs & Safety
Aviation
C-Suite Training



 International House 185 Tower Bridge
Road London SE1 2UF United Kingdom

 +44 7401 1773 35
+44 7480 775526

 Sales@blackbird-training.com

 www.blackbird-training.com

UK Training
PARTNER

