

## Managing Equity Portfolios

*Rome (Italy)*

*3 - 7 November 2025*

UK Training

# PARTNER



## Managing Equity Portfolios

Code: FA28 From: 3 - 7 November 2025 City: Rome (Italy) Fees: 4200 Pound

### 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.

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**

- 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

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**



or external client portfolios, the skills gained here will drive smarter decisions and measurable outcomes.

UK Training  
**PARTNER**

Head Office: +44 7480 775 526  
Email: [Sales@blackbird-training.com](mailto:Sales@blackbird-training.com)  
Website: [www.blackbird-training.com](http://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)



London (UK)



Istanbul (Turkey)



Amsterdam



Düsseldorf (Germany)  
(Switzerland)



Paris (France)



Athens (Greece)



Barcelona (Spain)



Munich (Germany)



Geneva



Prague (Czech)



Vienna (Austria)



Rome (Italy)



Brussels



Madrid (Spain)



Berlin (Germany)



Lisbon (Portugal)



Zurich



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)  
Korea



Phuket (Thailand)



Dubai (UAE)



Kuala Lumpur (Malaysia)



Kuwait City (Kuwait)



Seoul (South)



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

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

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**

