

€ TRAINING

Investment Management - Beginner Level





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Introduction:

This course introduces participants to the fundamentals of investment management, focusing on key principles, strategies, and tools used by professionals to maximize returns while managing risks.

Objectives:

By the end of the training, participants will be able to:

- Understand the basic concepts and principles of investment management.
- Learn how to create and manage an investment portfolio.
- Analyze the risk and return associated with different investment options.
- Gain knowledge about different asset classes and financial instruments.
- Apply basic investment strategies to achieve financial goals.

Target Audience:

- Beginners who are new to investment and financial markets.
- Individuals looking to build a personal or professional investment portfolio.
- Financial analysts or accountants moving into investment roles.
- Small business owners interested in investment strategies.

Outlines:

Unit 1

Introduction to Investment Management:

- Definition and Importance of Investment Management
- The Financial Markets: Overview and Types
- Key Investment Objectives: Risk, Return, and Liquidity
- Basic Concepts: Time Value of Money and Compound Interest
- Role of an Investment Manager

Unit 2

Asset Classes and Financial Instruments:

- Types of Asset Classes: Stocks, Bonds, Real Estate, Commodities
- Equity Investments: Characteristics and Types of Stocks
- Fixed Income Investments: Bonds and Treasury Bills
- Alternative Investments: Real Estate, Commodities, and Derivatives
- Mutual Funds and Exchange-Traded Funds ETFs

Unit 3

Portfolio Management:

- Introduction to Portfolio Construction
- Diversification and Its Importance
- Risk and Return Analysis
- The Modern Portfolio Theory Markowitz
- Asset Allocation Strategies

Unit 4

Risk Management in Investments:

- Types of Investment Risks: Market, Credit, Liquidity, and Operational
- Measuring Risk: Standard Deviation and Beta
- Risk-Return Trade-off
- Hedging Strategies: Using Derivatives for Risk Management
- Behavioral Finance: Understanding Investor Psychology

Unit 5

Investment Strategies and Performance Evaluation:

- Fundamental vs. Technical Analysis



- Long-Term vs. Short-Term Investment Strategies
- Value Investing and Growth Investing
- Active vs. Passive Investment Management
- Evaluating Portfolio Performance: Sharpe Ratio, Alpha, and Beta