

# € TRAINING

Mastering Investment Management



16 - 27 December 2024  
Tbilisi (Georgia)



# Mastering Investment Management

REF: F160 DATE: 16 - 27 December 2024 Venue: Tbilisi (Georgia) - Fee: 9915 Euro

## Introduction:

This training program provides an in-depth exploration of investment management, integrating key concepts of financial analysis, strategy development, and portfolio management. It empowers participants to develop a sophisticated understanding of investment principles and apply advanced techniques to manage and optimize investment portfolios.

## Program Objectives:

By the end of this program, participants will be able to:

- Develop comprehensive investment strategies aligned with financial goals.
- Analyze and interpret financial statements to inform investment decisions.
- Employ various investment appraisal techniques to evaluate potential opportunities.
- Construct and manage investment portfolios to maximize returns and manage risk.
- Understand and apply modern portfolio theory and asset allocation strategies.

## Targeted Audience:

- Investment Managers.
- Financial Analysts.
- Portfolio Managers.
- Asset Managers.
- Finance Professionals interested in advanced investment strategies.

## Program Outline:

### Unit 1:

#### Foundations of Investment Management:

- Understanding investment management principles.
- Key financial statements and their relevance to investments.

- Risk and return concepts.
- The role of investment managers in the financial ecosystem.
- Overview of different types of investments.

## Unit 2:

### Financial Statement Analysis:

- Techniques for analyzing financial statements.
- Understanding balance sheets, income statements, and cash flow statements.
- Financial ratios and their implications for investment decisions.
- Trend analysis and forecasting.
- Using financial analysis to evaluate investment opportunities.

## Unit 3:

### Investment Appraisal Techniques:

- Discounted Cash Flow DCF analysis.
- Net Present Value NPV and Internal Rate of Return IRR.
- Payback period and profitability index.
- Sensitivity and scenario analysis.
- Evaluating and comparing investment projects.

## Unit 4:

### Portfolio Management:

- Principles of portfolio theory.
- Asset allocation and diversification.
- Constructing and managing investment portfolios.
- Performance measurement and benchmarking.
- Risk management in portfolio management.

## Unit 5:

### Equity and Debt Investments:

- Analyzing and valuing equity securities.
- Understanding different types of debt instruments.
- Fixed income securities and their valuation.
- Evaluating stock and bond investments.
- Strategies for investing in equities and bonds.

## Unit 6:

### Derivatives and Alternative Investments:

- Overview of derivatives options, futures, swaps.
- Using derivatives for hedging and speculation.
- Introduction to alternative investments real estate, private equity, commodities.
- Evaluating the role of alternatives in a portfolio.
- Risk and return characteristics of alternative investments.

## Unit 7:

### Risk Management:

- Identifying and measuring investment risks.
- Techniques for managing investment risk.
- The role of insurance and derivatives in risk management.
- Stress testing and scenario analysis.
- Building risk mitigation strategies.

## Unit 8:

### Behavioral Finance and Market Trends:

- Understanding behavioral finance and its impact on investment decisions.
- Identifying common behavioral biases.

- Analyzing market trends and investor sentiment.
- Incorporating behavioral insights into investment strategies.
- Case studies of behavioral finance in action.

## Unit 9:

### Ethical and Regulatory Considerations:

- Ethical issues in investment management.
- Regulatory environment and compliance.
- Understanding fiduciary responsibilities.
- Best practices for ethical investing.
- Navigating regulatory changes and their impact.

## Unit 10:

### Advanced Investment Strategies:

- Leveraged and inverse funds.
- Structured products and their uses.
- Emerging markets and global investment strategies.
- Sustainable and socially responsible investing.
- Future trends in investment management.