

# € TRAINING

Investment Management - Beginner Level



27 - 31 October 2024  
Amman (Jordan)



# Investment Management - Beginner Level

REF: F2802 DATE: 27 - 31 October 2024 Venue: Amman (Jordan) - Fee: 3350 Euro

## 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