€TRAINING

Investment Management - Intermediate Level

18 - 22 November 2024
Paris (France)

Investment Management - Intermediate Level

REF: F2803 DATE: 18 - 22 November 2024 Venue: Paris (France) - Fee: 5940 Euro

Introduction:

This program focuses on foundational knowledge of investment strategies, portfolio management, and risk assessment techniques. It equips participants with the tools to evaluate and optimize investment portfolios, improving their ability to achieve desired financial outcomes.

Objectives:

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

- Understand advanced investment strategies and portfolio diversification.
- Assess and mitigate investment risks effectively.
- Analyze financial markets using quantitative and qualitative tools.
- Develop proficiency in managing different types of assets equities, bonds, derivatives.
- Evaluate the performance of investment portfolios.
- Targeted Audience:
- Financial analysts and advisors
- Portfolio managers
- Investment consultants
- Finance professionals seeking to advance their knowledge in investment management

Outlines:

Unit 1

Investment Strategies and Theories:

- Modern Portfolio Theory MPT and Efficient Market Hypothesis
- Active vs. Passive investment strategies
- Behavioral finance in investment decisions
- Quantitative and qualitative analysis in asset selection
- Strategic and tactical asset allocation

Unit 2

Risk Management in Investment:

- Types of investment risks market, credit, liquidity
- Risk assessment techniques VaR, Beta, Sharpe ratio
- Hedging strategies using derivatives options, futures
- Role of diversification in risk reduction
- Stress testing and scenario analysis

Unit 3

Asset Classes and Portfolio Construction:

- Understanding different asset classes equities, bonds, real estate, commodities
- Building a diversified portfolio
- Role of alternative investments private equity, hedge funds
- Strategic vs. tactical asset allocation
- Portfolio rebalancing and optimization

Unit 4

Investment Performance Evaluation:

- Key performance metrics alpha, beta, R-squared, Sharpe ratio
- Benchmarking portfolio performance
- Attribution analysis identifying sources of returns
- Evaluating mutual funds and ETFs
- Risk-adjusted performance measurement

Unit 5

Global Financial Markets and Emerging Trends:

- Overview of global financial markets

- Impact of macroeconomic factors interest rates, inflation, exchange rates
- ESG Environmental, Social, Governance investing and its impact
- Technological advancements in investment management AI, robo-advisors
- Trends in sustainable and ethical investing