

€ TRAINING

Investment Management



6 - 10 January 2025
Paris (France)



Investment Management

REF: F1733 DATE: 6 - 10 January 2025 Venue: Paris (France) - Fee: 5940 Euro

Introduction:

This training program is designed to provide a comprehensive understanding of investment management, equipping participants with the skills and knowledge necessary to make informed investment decisions, manage portfolios effectively, and understand the dynamics of financial markets.

Program Objectives:

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

- Understand the fundamentals of investment management and financial markets.
- Develop and implement effective investment strategies.
- Analyze and manage investment portfolios.
- Evaluate different asset classes and investment vehicles.
- Monitor and assess investment performance.

Target Audience:

- Investment professionals.
- Financial analysts.
- Portfolio managers.
- Financial advisors.

Program Outline:

Unit 1:

Fundamentals of Investment Management:

- Overview of investment management.
- Financial markets and instruments.
- Key concepts: risk, return, and diversification.
- Investment objectives and constraints.

- Ethical considerations in investment management.

Unit 2:

Investment Strategies and Planning:

- Developing an investment policy statement IPS.
- Strategic asset allocation.
- Tactical asset allocation.
- Active vs. passive investment strategies.
- Risk management techniques.

Unit 3:

Portfolio Management and Analysis:

- Portfolio construction and optimization.
- Performance measurement and attribution.
- Portfolio rebalancing strategies.
- Behavioral finance and investor psychology.
- Case studies in portfolio management.

Unit 4:

Asset Classes and Investment Vehicles:

- Equities and fixed income securities.
- Alternative investments: real estate, commodities, and hedge funds.
- Mutual funds and exchange-traded funds ETFs.
- Derivatives: options, futures, and swaps.
- Evaluating and selecting investment vehicles.

Unit 5:

Monitoring and Assessing Investment Performance:

- Techniques for monitoring investment performance.
- Benchmarking and performance evaluation.
- Adjusting portfolios based on performance.
- Importance of Reporting and communication with stakeholders.
- Continuous improvement in investment management.