

€ TRAINING

Managing Equity Portfolios



6 - 17 April 2025
Amman (Jordan)



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REF: T2001 DATE: 6 - 17 April 2025 Venue: Amman (Jordan) - Fee: 5525 Euro

Introduction:

Equity portfolio management involves strategically selecting and managing a diverse set of equity investments to achieve specific financial objectives. It requires a deep understanding of market dynamics, risk management, and performance evaluation techniques to optimize returns while mitigating risks. This training program equips participants with the advanced knowledge and tools to design, manage, and adapt equity portfolios in line with evolving market trends and client goals.

Program Objectives:

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

- Explore the fundamentals of equity portfolio management and its significance in investment strategies.
- Develop strategies for asset selection and portfolio diversification.
- Conduct risk management techniques to optimize portfolio performance.
- Evaluate portfolio performance using financial metrics and benchmarks.
- Adapt portfolio strategies to align with evolving market conditions and client objectives.

Targeted Audience:

- Portfolio managers and investment professionals.
- Financial analysts and equity researchers.
- Wealth management advisors and private bankers.
- Institutional investors and fund managers.

Program Outline:

Unit 1:

Fundamentals of Equity Portfolio Management:

- Overview of equity markets and instruments.
- Understanding portfolio objectives and constraints.
- Role of equity portfolios in diversified investment strategies.

- Introduction to active vs. passive portfolio management.
- Aligning portfolio strategies with client goals and risk tolerance.

Unit 2:

Equity Asset Selection and Allocation:

- Analyzing financial statements and fundamental metrics for stock selection.
- Leveraging quantitative and qualitative methods in asset selection.
- Sector and industry analysis for strategic allocation.
- Geographic and market-cap considerations in equity allocation.
- How to construct a portfolio to maximize risk-adjusted returns.

Unit 3:

Diversification and Risk Management:

- The importance of diversification in equity portfolios.
- Identifying and mitigating portfolio-specific risks.
- Hedging techniques using derivatives and other financial instruments.
- Balancing systematic and unsystematic risks.
- Monitoring risk exposure and maintaining portfolio resilience.

Unit 4:

Portfolio Performance Evaluation:

- Key performance metrics: alpha, beta, Sharpe ratio, and Treynor ratio.
- Benchmarking performance against market indices.
- Attribution analysis to assess portfolio manager decisions.
- Evaluating portfolio turnover and transaction costs.
- Reporting techniques and presenting portfolio performance to stakeholders.

Unit 5:

Active Portfolio Management Strategies:

- How to implement growth, value, and blend strategies.
- Momentum investing and contrarian approaches.
- Leveraging market inefficiencies for alpha generation.
- Tactical vs. strategic asset allocation in active management.

Unit 6:

Passive Portfolio Management Strategies:

- Introduction to index funds and ETFs.
- Benefits and limitations of passive investing.
- Techniques for constructing and managing index-tracking portfolios.
- Minimizing costs through passive investment vehicles.
- Trends in passive investing and their implications for portfolio managers.

Unit 7:

Behavioral Finance in Portfolio Management:

- Understanding investor psychology and market behaviors.
- Impact of behavioral biases on equity portfolio decisions.
- Strategies to mitigate the effects of emotional decision-making.
- Enhancing portfolio strategies using behavioral insights.
- Promoting rational decision-making in portfolio management.

Unit 8:

ESG Environmental, Social, and Governance Integration:

- The role of ESG factors in equity portfolio management.
- Analyzing ESG metrics for asset selection and allocation.
- Impact of ESG-focused strategies on portfolio performance.
- Balancing financial and non-financial goals in ESG investing.

Unit 9:

Adapting to Market Trends and Conditions:

- Monitoring economic indicators and market trends.
- Strategies for managing portfolios in volatile markets.
- Adapting to regulatory and technological changes in equity markets.
- Incorporating global macroeconomic trends into portfolio decisions.

Unit 10:

Advanced Equity Portfolio Strategies:

- Implementing factor-based investing approaches.
- Leveraging quantitative models for portfolio construction.
- Multi-factor portfolio optimization techniques.
- Integrating alternative investments with equity portfolios.