

Course No. 1791

Advanced AI & Financial Investment

**DIGITAL BANKING, FINTECH & AI
FINANCE, INVESTMENT & BANKING**

DURATION

5 Days

LOCATION

Munich, Germany

DELIVERY

Classroom

DATES

11 – 15 Jan 2027



Scheduled Event Details

CITY	Munich, Germany
DATE	11 – 15 Jan 2027
DELIVERY TYPE	Classroom
COURSE FEE	€5,400

Course Overview

Advanced AI & Financial Investment is an advanced professional training course designed to equip investment, finance, and senior management professionals with the knowledge required to understand how artificial intelligence is transforming investment analysis, portfolio management, financial markets, risk assessment, and investment decision-making. The programme focuses on the strategic and practical use of AI to enhance investment intelligence while maintaining sound financial judgment and appropriate governance.

The course explores advanced applications of artificial intelligence, machine learning, predictive analytics, natural language processing, and intelligent automation across the investment lifecycle. Participants will examine how AI can support market analysis, asset evaluation, portfolio construction, opportunity identification, risk monitoring, scenario analysis, and investment research.

Particular attention is given to the quality and interpretation of AI-generated investment insights. Participants will learn how to evaluate model outputs, identify data limitations, understand uncertainty and model risk, and combine AI-driven analysis with professional investment judgment rather than relying on automated recommendations without appropriate validation.

Through practical investment scenarios, case studies, analytical exercises, and strategic workshops, participants will develop a structured approach to identifying and evaluating AI opportunities within investment functions. The programme supports banks, investment firms, asset managers, sovereign and institutional investors, financial institutions, and large organizations seeking to strengthen investment intelligence and build responsible AI-enabled investment capabilities.

Objectives

- Analyze advanced applications of artificial intelligence across investment analysis, financial markets, and portfolio management.
- Evaluate the suitability of AI, machine learning, and predictive analytics for different investment decisions and processes.
- Apply AI-supported approaches to market analysis, asset evaluation, financial forecasting, and investment research.
- Develop practical methods for using AI to identify investment opportunities, market trends, and emerging financial signals.
- Assess AI-generated investment recommendations using data quality, assumptions, uncertainty, and model performance.
- Apply AI-enabled techniques to portfolio analysis, asset allocation, diversification, and investment monitoring.
- Evaluate the application of AI in investment risk identification, stress testing, scenario analysis, and early-warning mechanisms.
- Assess model risk, algorithmic bias, data limitations, and other risks associated with AI-driven investment decisions.
- Strengthen human oversight and professional judgment when using AI for financial investment activities.
- Design an AI-enabled investment framework aligned with investment objectives, risk appetite, governance requirements, and organizational strategy.

Who Should Attend

This course is designed for Investment Directors, Chief Investment Officers, Portfolio Managers, Asset Managers, Investment Analysts, Financial Analysts, Treasury professionals, Wealth Management professionals, and professionals involved in investment research, asset allocation, capital markets, and financial strategy.

It is also suitable for executives and senior managers in banks, investment companies, asset management firms, sovereign and institutional investment organizations, insurance companies, family offices, government investment entities, and large corporations. Professionals working in risk management, compliance, financial analytics, digital transformation, data analytics, and investment technology will also benefit from the programme.

The course is particularly relevant to decision makers responsible for evaluating AI adoption within investment functions and professionals seeking to understand how advanced AI capabilities can improve investment intelligence while preserving governance, risk controls, transparency, and professional accountability.

Learning Outcomes

- Identify advanced AI applications across the investment management lifecycle.
- Evaluate investment use cases according to potential value, feasibility, data requirements, and risk.
- Use AI-supported analytical approaches to assess markets, securities, sectors, and investment opportunities.
- Interpret predictive models and AI-generated financial signals while recognizing uncertainty and limitations.
- Apply AI-supported techniques to portfolio construction, asset allocation, and diversification analysis.
- Use AI to strengthen investment risk monitoring, scenario analysis, and stress-testing activities.
- Assess the reliability of AI-generated investment recommendations before incorporating them into decision-making.
- Identify data quality, model risk, bias, and governance issues affecting AI-enabled investment processes.
- Integrate AI-generated insights with human expertise and investment judgment.
- Develop a practical roadmap for implementing responsible AI capabilities within an investment function.

Course Outline

DAY 01

Advanced Artificial Intelligence for Financial Investment

- Evolution of artificial intelligence in financial markets and investment management
- Advanced AI, machine learning, predictive analytics, and intelligent automation
- AI across the investment decision-making lifecycle

DAY 01 — CONTINUED

- Investment research, market intelligence, and automated information analysis
- Identifying high-value AI applications within investment functions
- Opportunities and limitations of AI-driven investment analysis
- The changing role of investment professionals in AI-enabled environments

PRACTICAL APPLICATION

Mapping the investment lifecycle and identifying AI opportunities

DAY 02

AI-Powered Investment Analysis & Market Intelligence

- Artificial intelligence for market and economic analysis
- AI-supported analysis of securities, sectors, and investment opportunities
- Identifying market trends, patterns, signals, and emerging opportunities
- Predictive analytics for financial markets and investment forecasting
- Using artificial intelligence to process large volumes of financial information
- Natural language processing for financial news, reports, disclosures, and market information
- Evaluating AI-generated investment insights and financial signals

PRACTICAL APPLICATION

Developing an AI-supported investment research framework

DAY 03

AI for Portfolio Management & Asset Allocation

- Artificial intelligence in portfolio management and investment decision-making
- AI-supported asset allocation and portfolio optimization
- Portfolio diversification and correlation analysis
- Using predictive models to support portfolio positioning
- AI applications in performance analysis and portfolio monitoring
- Scenario analysis and dynamic investment strategies

DAY 03 — CONTINUED

- Balancing AI recommendations with investment objectives and risk appetite
- Human judgment and oversight in AI-supported portfolio decisions

PRACTICAL APPLICATION

Building an AI-supported portfolio analysis and asset allocation scenario

DAY 04

AI, Investment Risk & Model Governance

- AI applications in investment risk management
- Identifying market, credit, liquidity, and portfolio risks using advanced analytics
- AI-supported stress testing and scenario analysis
- Early-warning indicators and predictive risk signals
- Understanding model risk and limitations in AI-based investment systems
- Data quality, bias, uncertainty, and inaccurate predictions
- Explainability, transparency, accountability, and human oversight
- Governance and responsible use of AI in investment management

PRACTICAL APPLICATION

Conducting an AI investment model risk and governance assessment

DAY 05

Building an AI-Enabled Investment Strategy

- Developing an AI strategy for investment management
- Prioritizing AI investment use cases based on value, feasibility, and risk
- Building the data, technology, governance, and human capabilities required for AI adoption
- Integrating AI into investment research, portfolio management, and risk processes
- Measuring the performance and business value of AI-enabled investment initiatives
- Managing organizational change and developing AI-ready investment teams
- Scaling successful AI applications across investment functions

DAY 05 — CONTINUED

- Establishing continuous monitoring and improvement mechanisms

FINAL WORKSHOP

Developing an Advanced AI & Financial Investment Strategy and Implementation Roadmap

Register or Request More Information

Course page: <https://quest-training.com/courses/advanced-ai-financial-investment>

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