QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1475

Advanced Asset Management Strategies Training Course

INVESTMENT & ASSET MANAGEMENT
FINANCE, INVESTMENT & BANKING

DURATION
5 Days

DELIVERY
Classroom

Course Overview

The Advanced Asset Management Strategies Training Course provides an advanced and practical framework for developing and implementing sophisticated asset management and investment strategies designed to balance return, risk, liquidity, and long-term value creation. The course is designed to strengthen participants' ability to evaluate assets, construct diversified portfolios, manage investment risks, monitor performance, and adjust strategies in response to changing market and economic conditions.

Effective asset management requires more than selecting investments with attractive expected returns. Investment professionals must understand asset characteristics, economic cycles, liquidity profiles, risk exposures, correlations, valuation factors, and the interaction between individual assets and the broader portfolio. The course develops a structured approach to strategic decision making that considers investment objectives, risk tolerance, time horizon, liquidity requirements, governance frameworks, and long-term financial obligations.

The program covers advanced asset allocation, strategic and tactical portfolio management, diversification, correlation analysis, market and credit risk, liquidity management, concentration risk, fixed income, equities, alternative investments, real assets, and portfolio optimization. Participants will explore how different asset classes contribute to portfolio risk and return and how their behavior may change under different economic and market conditions.

A strong emphasis is placed on managing portfolios in uncertain and changing environments. Participants will examine the impact of interest rates, inflation, economic cycles, market volatility, liquidity conditions, geopolitical developments, and changing investment opportunities. The course also addresses scenario analysis, stress testing, sensitivity analysis, portfolio rebalancing, performance measurement, investment governance, and the development of robust investment policies.

Through investment case studies, portfolio construction exercises, asset allocation workshops, risk analysis, stress testing, performance evaluation, and executive strategy sessions, the Advanced Asset Management Strategies Training Course develops practical capabilities for institutional and corporate investment environments. The program is suitable for banks, asset management firms, investment companies, sovereign and institutional investors, government entities, ministries, pension and insurance organizations, oil and gas companies, and large corporations.

Objectives

- Analyze advanced asset management principles and their role in achieving long-term investment objectives during the course.
- Evaluate the characteristics of major asset classes in terms of expected return, risk, liquidity, valuation, and economic sensitivity.
- Develop advanced asset allocation strategies aligned with investment objectives, risk tolerance, time horizon, and institutional constraints.
- Apply diversification and correlation analysis to improve portfolio structure and manage concentration risk.
- Assess market, credit, liquidity, currency, counterparty, and concentration risks across different asset classes.
- Design integrated portfolio strategies incorporating strategic asset allocation, tactical allocation, and systematic rebalancing.
- Apply scenario analysis and stress testing to evaluate portfolio resilience under changing economic and market conditions.
- Evaluate asset and portfolio performance using return, risk, and risk-adjusted performance measures.
- Analyze the contribution of asset selection and allocation decisions to overall portfolio performance.
- Develop practical liquidity management and cash planning frameworks for investment portfolios.
- Strengthen investment governance, policy frameworks, monitoring mechanisms, and risk controls.
- Align advanced asset management strategies with long-term value creation, financial sustainability, organizational objectives, and investment governance.

Who Should Attend

This course is designed for professionals working in asset management, investment management, portfolio management, wealth management, treasury, corporate finance, and investment risk management. It is particularly relevant to Asset Managers, Portfolio Managers, Investment Managers, Investment Analysts, Asset Allocation Specialists, Risk Managers, Treasury Managers, Financial Analysts, Institutional Investment Specialists, and professionals responsible for developing, implementing, or monitoring investment strategies.

The program is also suitable for Chief Executive Officers, Chief Financial Officers, Chief Investment Officers, Heads of Asset Management, Portfolio Directors, Treasury Directors, Investment Committee Members, and senior decision makers responsible for capital allocation, liquidity management, strategic investments, and portfolio performance. Professionals working in government entities, ministries, sovereign-related organizations, banks, financial institutions, pension and insurance environments, oil and gas companies, infrastructure organizations, and large corporations can benefit from the advanced frameworks covered in the course.

The course is particularly valuable for professionals involved in investment policy development, asset allocation, portfolio construction, investment risk management, performance measurement, portfolio rebalancing, liquidity planning, and strategic investment reviews. Governance, compliance, internal audit, and risk professionals can also benefit from understanding how asset management strategies interact with investment policies, risk controls, and institutional performance.

Learning Outcomes

- Explain advanced concepts and strategic approaches used in asset management and investment portfolio management.
- Analyze the characteristics of major asset classes and evaluate their expected return, risk, liquidity, and economic behavior.
- Develop asset allocation strategies aligned with investment objectives, risk tolerance, liquidity needs, and institutional constraints.
- Construct diversified portfolios using strategic allocation, tactical allocation, and correlation analysis.
- Identify and assess major portfolio risks, including market, credit, liquidity, currency, counterparty, and concentration risks.
- Apply portfolio rebalancing techniques to maintain target allocations and acceptable risk levels.
- Conduct scenario analysis and stress testing to evaluate portfolio resilience under adverse market conditions.
- Evaluate portfolio performance using absolute, relative, and risk-adjusted performance measures.
- Analyze the contribution of asset allocation and security selection decisions to overall investment results.
- Develop liquidity management approaches that support portfolio obligations and changing investment requirements.

- Prepare executive-level investment reports covering portfolio performance, risk, opportunities, and recommended actions.
- Develop an integrated asset management strategy aligned with governance, risk management, financial sustainability, and long-term value creation.

Course Outline

DAY 01

Advanced Asset Management Foundations and Investment Strategy

- Strategic role of asset management in long-term value creation
- Relationship between investment strategy, assets, liabilities, and financial objectives
- Investor objectives, risk tolerance, investment horizon, and portfolio constraints
- Characteristics of major asset classes and their investment roles
- Relationship between risk, return, liquidity, and diversification
- Economic cycles and their influence on asset performance
- Identifying investment objectives, constraints, and risk exposures
- Developing investment policy principles and strategic priorities

PRACTICAL APPLICATION

Analyze an institutional investment case and define objectives, constraints, risk profile, and appropriate asset class priorities

DAY 02

Strategic Asset Allocation, Tactical Allocation and Portfolio Construction

- Principles of strategic asset allocation
- Tactical asset allocation and market opportunity management
- Diversification and correlation analysis
- Portfolio concentration and exposure management
- Portfolio construction across different risk profiles

DAY 02 — CONTINUED

- Strategic selection of asset classes and investment instruments
- Liquidity planning and future cash requirements
- Risk-return trade-offs and portfolio efficiency

PRACTICAL APPLICATION

Construct a diversified portfolio based on defined investment objectives, risk tolerance, liquidity requirements, and institutional constraints

DAY 03

Advanced Portfolio Risk Management and Stress Testing

- Market, credit, liquidity, currency, and counterparty risks
- Concentration risk and portfolio dependency
- Volatility, drawdown, and downside risk analysis
- Portfolio risk limits and key risk indicators
- Scenario analysis under alternative economic conditions
- Stress testing of portfolios and asset classes
- Sensitivity analysis for key market and portfolio variables
- Assessing portfolio resilience and developing response strategies

PRACTICAL APPLICATION

Conduct a comprehensive portfolio stress test and evaluate the impact on risk, liquidity, return, and investment objectives

DAY 04

Alternative Investments, Real Assets and Portfolio Optimization

- Strategic role of alternative investments in asset management
- Private equity and venture capital within institutional portfolios
- Real estate and infrastructure investment considerations
- Commodity, energy, and other real asset strategies

DAY 04 — CONTINUED

- Liquidity considerations for less-liquid investments
- Risk and return characteristics of alternative asset classes
- Diversification benefits and limitations of alternative investments
- Reassessing portfolio structure under changing market conditions

PRACTICAL APPLICATION

Develop an allocation strategy combining traditional and alternative assets and evaluate its impact on risk, return, diversification, and liquidity

DAY 05

Performance Measurement, Governance and Executive Asset Management Strategy

- Measuring asset and portfolio performance
- Absolute and relative performance analysis
- Benchmark selection and benchmark governance
- Risk-adjusted performance measurement
- Attribution of asset allocation and investment selection decisions
- Portfolio rebalancing frameworks and strategic adjustment triggers
- Investment reporting and executive portfolio dashboards
- Investment governance, policies, controls, and accountability
- Continuous improvement of asset management strategies

FINAL WORKSHOP

Develop and present an advanced asset management strategy covering investment objectives, asset allocation, diversification, liquidity, risk management, alternative investments, stress testing, performance measurement, rebalancing, governance, and implementation priorities

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Register or Request More Information

Course page: https://quest-training.com/courses/advanced-asset-management-strategies-training-course
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