QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1487

Alternative Investments & Asset Allocation Training Course

INVESTMENT & ASSET MANAGEMENT
FINANCE, INVESTMENT & BANKING

DURATION
5 Days

DELIVERY
Classroom

Course Overview

The Alternative Investments & Asset Allocation Training Course provides a comprehensive professional framework for understanding alternative investments and applying effective asset allocation principles within institutional and investment portfolios. As investors increasingly seek diversification beyond traditional equities and fixed income securities, alternative investments can play an important role in enhancing portfolio diversification, managing risk exposures, and accessing different sources of return.

The course examines major alternative investment categories, including private equity, venture capital, hedge funds, real estate, infrastructure, commodities, private credit, and other specialized investment strategies. Participants will explore the characteristics, risk-return profiles, liquidity considerations, valuation approaches, investment structures, and portfolio roles of these asset classes, enabling them to evaluate alternative investment opportunities using a structured and disciplined approach.

A central focus of the program is Asset Allocation and its role in translating investment objectives into practical portfolio structures. Participants will examine strategic and tactical asset allocation, diversification principles, portfolio constraints, risk tolerance, investment horizons, liquidity requirements, and the relationship between asset classes. The course also addresses how alternative investments can be integrated into diversified portfolios while considering their unique liquidity, valuation, governance, and risk characteristics.

Designed for banks, investment institutions, asset management organizations, government entities, sovereign and institutional investors, family offices, insurance organizations, and large corporations, this program combines investment theory with practical portfolio applications. It enables executives, investment managers, portfolio specialists, financial analysts, risk professionals, and decision makers to assess alternative investment opportunities and develop asset allocation approaches aligned with organizational objectives and investment policies.

Objectives

- Analyze the characteristics, structures, and investment roles of major alternative asset classes during the course.
- Evaluate the risk-return characteristics, liquidity profiles, and portfolio contribution of alternative

investments using practical investment scenarios.

- Assess private equity, venture capital, hedge funds, real estate, infrastructure, commodities, and private credit investment opportunities.
- Apply strategic asset allocation principles to develop diversified investment portfolio structures aligned with defined objectives.
- Evaluate the impact of investment horizon, liquidity requirements, risk tolerance, and portfolio constraints on asset allocation decisions.
- Develop appropriate approaches for integrating alternative investments into diversified institutional portfolios.
- Analyze portfolio diversification and identify concentration risks across traditional and alternative asset classes.
- Apply quantitative and qualitative methods to evaluate alternative investment opportunities and portfolio exposures.
- Assess valuation, performance measurement, and risk considerations associated with less liquid and privately held investments.
- Design an asset allocation framework that balances expected return, risk, diversification, and liquidity requirements.
- Develop portfolio monitoring and rebalancing approaches that respond to changing market conditions and investment objectives.
- Align alternative investment strategies with institutional investment policies, governance requirements, and long-term financial objectives.

Who Should Attend

This course is designed for investment and financial professionals responsible for portfolio construction, asset allocation, investment analysis, and portfolio oversight. It is particularly relevant for Portfolio Managers, Investment Managers, Asset Allocation Specialists, Alternative Investment Professionals, Financial Analysts, Investment Analysts, Wealth Management Professionals, Treasury Professionals, Risk Managers, and professionals working in institutional investment and asset management.

The program is also suitable for executives, senior managers, department heads, and decision makers involved in investment strategy, capital allocation, portfolio governance, and financial risk management. Professionals working in banks, investment firms, insurance companies, pension and institutional investment organizations, government entities, sovereign investment institutions, family offices, and large corporations can benefit from developing a stronger understanding of alternative investments and strategic Asset Allocation.

Learning Outcomes

- Explain the structure, characteristics, and investment objectives of major alternative asset classes.
- Compare private equity, venture capital, hedge funds, real estate, infrastructure, commodities, and private credit from a portfolio perspective.
- Evaluate alternative investment opportunities based on expected return, risk, liquidity, investment horizon, and portfolio fit.
- Analyze the role of alternative investments in improving portfolio diversification and managing concentration risk.
- Construct strategic asset allocation models based on investment objectives, risk tolerance, liquidity requirements, and time horizons.
- Distinguish between strategic and tactical asset allocation approaches and identify appropriate applications for each.
- Assess the impact of alternative investment characteristics on portfolio liquidity, valuation, risk, and performance measurement.
- Apply practical techniques for evaluating portfolio diversification across traditional and alternative investments.
- Develop approaches for monitoring alternative investment exposures and identifying emerging portfolio risks.
- Evaluate portfolio performance using appropriate benchmarks, risk measures, and investment objectives.
- Develop portfolio rebalancing approaches that reflect changing market conditions and institutional requirements.
- Prepare an integrated alternative investment and Asset Allocation strategy suitable for a defined investment mandate.

Course Outline

DAY 01

Alternative Investments Fundamentals and Investment Landscape

- Introduction to alternative investments and their role in modern portfolios
- Differences between traditional and alternative investments
- Private equity and venture capital investment structures
- Hedge funds and alternative investment strategies
- Real estate and infrastructure investments
- Commodities and natural resource investments
- Private credit and other private market opportunities
- Risk, return, liquidity, and investment horizon considerations

PRACTICAL APPLICATION

Comparing alternative asset classes and assessing their potential portfolio roles

DAY 02

Alternative Investment Analysis and Due Diligence

- Evaluating alternative investment opportunities and investment mandates
- Investment structures, fund structures, and capital commitments
- Analysis of private equity and venture capital opportunities
- Evaluating hedge fund strategies and sources of return
- Real estate and infrastructure investment analysis
- Private credit risk and return considerations
- Valuation challenges in private and less liquid investments
- Investment due diligence and manager evaluation

PRACTICAL APPLICATION

Conducting a structured evaluation of an alternative investment opportunity

DAY 03

Asset Allocation Principles and Portfolio Construction

- Fundamentals of Asset Allocation and portfolio diversification
- Strategic asset allocation and long-term investment objectives
- Tactical asset allocation and market opportunity assessment
- Risk tolerance, investment horizon, and liquidity requirements
- Portfolio constraints and investment policy considerations
- Correlation, diversification, and concentration risk
- Integrating traditional and alternative asset classes
- Portfolio construction approaches and allocation frameworks

PRACTICAL APPLICATION

Building a diversified multi-asset portfolio

DAY 04

Portfolio Risk, Performance, and Alternative Investment Integration

- Measuring portfolio risk and identifying key risk exposures
- Liquidity risk and capital commitment considerations
- Valuation risk and performance measurement challenges
- Portfolio concentration and exposure analysis
- Risk-adjusted return assessment
- Benchmark selection and performance attribution
- Stress testing and scenario analysis for diversified portfolios
- Integrating alternative investments into institutional portfolios

PRACTICAL APPLICATION

Evaluating portfolio risk and assessing the impact of alternative investments

DAY 05

Strategic Asset Allocation and Portfolio Implementation

- Developing an integrated Asset Allocation framework
- Setting portfolio targets and allocation ranges
- Rebalancing strategies and portfolio governance
- Monitoring investment performance and portfolio exposures
- Aligning alternative investments with investment policies and institutional objectives
- Evaluating changing market conditions and their impact on allocation decisions
- Developing investment recommendations for senior decision makers
- Portfolio implementation considerations and ongoing monitoring

FINAL WORKSHOP

Developing a complete Alternative Investments & Asset Allocation strategy and implementation action plan

Register or Request More Information

Course page: https://quest-training.com/courses/alternative-investments-asset-allocation-training-course
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