

Course No. 1474

# Investment Analysis & Portfolio Management Training Course

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**INVESTMENT & ASSET MANAGEMENT  
FINANCE, INVESTMENT & BANKING**

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DURATION

**5 Days**

DELIVERY

**Classroom**



## Course Overview

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The Investment Analysis & Portfolio Management Training Course provides an advanced and practical framework for evaluating investment opportunities, analyzing financial instruments, constructing diversified portfolios, managing investment risk, and monitoring portfolio performance. The course is designed to strengthen participants' ability to make disciplined investment decisions based on financial analysis, valuation, market conditions, risk characteristics, asset allocation, and long-term investment objectives.

Effective investment analysis requires more than examining historical returns. Investors and portfolio managers must evaluate financial performance, business fundamentals, valuation, market dynamics, liquidity, risk, economic conditions, and the relationship between expected return and potential loss. The course develops a structured approach to analyzing equities, fixed-income securities, and other investment opportunities while considering both quantitative and qualitative factors in the decision-making process.

The program covers fundamental and advanced investment analysis techniques, including financial statement analysis, valuation methods, equity analysis, fixed-income analysis, risk-return assessment, asset allocation, diversification, portfolio construction, and performance evaluation. Participants will examine how to identify attractive investment opportunities, assess intrinsic value, compare alternatives, and determine whether an investment is consistent with portfolio objectives and risk constraints.

A major focus is placed on portfolio management and the practical process of converting individual investment analysis into a coherent portfolio strategy. Participants will explore strategic and tactical asset allocation, diversification, correlation, portfolio risk, portfolio rebalancing, investment constraints, liquidity considerations, and benchmark selection. The course also addresses portfolio performance measurement, attribution, monitoring, and adjustments in response to changing market conditions and investment objectives.

Through investment case studies, security analysis exercises, valuation assessments, portfolio construction workshops, risk analysis, and performance evaluation simulations, the Investment Analysis & Portfolio Management Training Course develops practical capabilities that can be applied across banks, investment firms, asset managers, family offices, sovereign and institutional investors, government entities, and large corporations. The program is suitable for executives, investment

professionals, portfolio managers, financial analysts, treasury specialists, risk managers, and decision makers responsible for investment strategy and capital allocation.

## Objectives

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- Analyze the principles of investment analysis and portfolio management and their role in effective capital allocation during the course.
- Evaluate financial statements, business fundamentals, market conditions, and economic indicators when assessing investment opportunities.
- Apply fundamental and valuation techniques to assess the attractiveness and relative value of investment instruments.
- Develop structured approaches for evaluating equities, fixed-income securities, and other relevant investment opportunities.
- Assess risk and expected return using quantitative and qualitative investment analysis methods.
- Design diversified portfolios based on investment objectives, risk tolerance, time horizon, liquidity requirements, and constraints.
- Apply asset allocation, diversification, correlation, and portfolio optimization principles to improve portfolio structure.
- Evaluate portfolio performance against relevant benchmarks and investment objectives.
- Analyze portfolio risk, concentration, volatility, liquidity, and exposure to changing market conditions.
- Develop portfolio rebalancing and monitoring approaches based on changes in market conditions, risk, and investment objectives.
- Strengthen investment reporting and decision support using appropriate performance, risk, and attribution measures.
- Align investment analysis and portfolio management practices with governance, risk management, fiduciary responsibilities, and long-term investment objectives.

## Who Should Attend

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This course is designed for professionals working in investment management, portfolio management, asset management, wealth management, treasury, corporate finance, financial analysis, and risk management. It is particularly relevant to Portfolio Managers, Investment Managers, Investment Analysts, Equity Analysts, Fixed-Income Analysts, Treasury Professionals, Financial Analysts, Asset Allocation Specialists, Risk Managers, and professionals responsible for

evaluating securities or managing investment portfolios.

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

The course is particularly valuable for professionals involved in investment research, security selection, portfolio construction, asset allocation, investment policy development, risk monitoring, performance reporting, and strategic investment reviews. It also provides practical value for professionals in internal audit, governance, compliance, and finance who need a stronger understanding of investment decision processes and portfolio risk management.

## Learning Outcomes

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- Explain the core principles of investment analysis and portfolio management.
- Analyze financial statements and business fundamentals to assess the quality and financial strength of potential investments.
- Evaluate equity and fixed-income securities using appropriate analytical and valuation techniques.
- Assess investment opportunities based on expected return, valuation, risk, liquidity, and market conditions.
- Determine the relationship between investment objectives, risk tolerance, time horizon, and portfolio structure.
- Construct diversified portfolios using appropriate asset allocation and security selection techniques.
- Analyze correlation, concentration, volatility, and other portfolio risk characteristics.
- Evaluate portfolio performance against benchmarks and defined investment objectives.
- Apply portfolio rebalancing techniques to maintain desired asset allocations and risk characteristics.
- Conduct scenario and sensitivity analysis to assess portfolio resilience under changing market

conditions.

- Prepare professional investment and portfolio reports for senior management and investment committees.
- Develop an integrated portfolio management strategy aligned with governance, risk, liquidity, and long-term investment objectives.

## Course Outline

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### DAY 01

## Investment Analysis Foundations and Financial Market Assessment

- Principles and objectives of investment analysis
- Investment decision-making process and investment policy considerations
- Relationship between risk, return, liquidity, and time horizon
- Overview of major asset classes and financial instruments
- Macroeconomic factors affecting investment markets
- Industry and sector analysis
- Business model, competitive position, and management quality assessment
- Financial statement analysis and key investment indicators

### PRACTICAL APPLICATION

Analyze an investment opportunity using financial, economic, industry, and company-level information

### DAY 02

## Security Analysis, Valuation and Investment Selection

- Equity investment analysis and fundamental research
- Revenue, earnings, cash flow, profitability, and balance sheet assessment
- Financial ratios and comparative analysis
- Intrinsic value and relative valuation concepts
- Discounted cash flow and valuation assumptions

## DAY 02 — CONTINUED

- Market-based valuation approaches and valuation multiples
- Fixed-income analysis, credit quality, maturity, and yield considerations
- Duration, interest rate sensitivity, and credit risk

**PRACTICAL APPLICATION**

Evaluate equity and fixed-income investment opportunities and develop an investment recommendation based on valuation and risk

## DAY 03

**Portfolio Construction, Asset Allocation and Diversification**

- Principles of portfolio management
- Strategic and tactical asset allocation
- Risk tolerance, investment objectives, and portfolio constraints
- Diversification and correlation
- Portfolio construction and security selection
- Portfolio concentration and exposure management
- Risk-return trade-offs and portfolio efficiency
- Liquidity requirements and investment horizon
- Portfolio optimization concepts and practical allocation decisions

**PRACTICAL APPLICATION**

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

## DAY 04

**Portfolio Risk Management, Monitoring and Rebalancing**

- Portfolio risk identification and measurement
- Market, credit, liquidity, concentration, and currency risks
- Volatility, drawdown, and downside risk assessment
- Scenario analysis and stress testing

## DAY 04 — CONTINUED

- Monitoring portfolio exposure and investment limits
- Benchmark selection and tracking
- Portfolio rebalancing principles and triggers
- Changing market conditions and strategic portfolio adjustments
- Investment governance and risk controls

**PRACTICAL APPLICATION**

Conduct a portfolio risk review and develop a rebalancing strategy based on changes in market conditions and risk exposures

## DAY 05

## Portfolio Performance Evaluation and Executive Investment Strategy

- Portfolio performance measurement and evaluation
- Absolute and relative performance analysis
- Benchmark comparison and performance attribution
- Risk-adjusted performance concepts
- Evaluating security selection and asset allocation decisions
- Investment reporting for management and investment committees
- Developing portfolio monitoring dashboards and key performance indicators
- Reviewing investment policies and portfolio objectives
- Integrating market outlook, risk analysis, and portfolio strategy

**FINAL WORKSHOP**

Develop and present a complete investment and portfolio management strategy covering investment objectives, market analysis, security selection, valuation, asset allocation, diversification, risk management, performance evaluation, rebalancing, governance, and executive recommendations



## **Register or Request More Information**

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Course page: <https://quest-training.com/courses/investment-analysis-portfolio-management-training-course>

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