

Course No. 1477

Strategic Investment Management Training Course

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

DURATION

5 Days

DELIVERY

Classroom



Course Overview

The Strategic Investment Management Training Course provides an advanced and practical framework for developing, implementing, and managing investment strategies designed to balance expected return, risk, liquidity, and long-term value creation. The course focuses on moving beyond individual investment decisions toward a strategic investment management approach that connects investor objectives, capital allocation, portfolio management, market conditions, governance, and performance measurement.

Strategic investment management requires a comprehensive understanding of the economic, financial, and market factors that influence asset values and portfolio outcomes. Participants will examine how to analyze economic conditions, market cycles, interest rates, inflation, asset valuations, liquidity, and risk exposures, and then translate these insights into practical decisions regarding asset allocation, investment selection, portfolio construction, and strategic positioning.

The program focuses on developing investment strategies that can be implemented and monitored through clearly defined objectives, risk parameters, investment horizons, liquidity requirements, and institutional constraints. It covers strategic and tactical asset allocation, diversification, concentration management, benchmark selection, investment policies, portfolio rebalancing, performance evaluation, and investment governance, helping organizations maintain consistency between investment decisions and broader financial objectives.

Particular attention is given to investment risk management and portfolio resilience in changing market environments. Participants will explore how interest rate movements, inflation, economic cycles, market volatility, liquidity pressures, geopolitical developments, and changes in investor requirements can affect investment outcomes. Scenario analysis, sensitivity analysis, stress testing, and risk monitoring techniques are used to evaluate portfolio resilience and support timely strategic adjustments.

Through investment case studies, asset allocation exercises, portfolio construction workshops, risk analysis, performance evaluation, and executive strategy simulations, the Strategic Investment Management Training Course develops practical capabilities that can be applied across banks, asset management firms, institutional investors, government entities, sovereign-related organizations, insurance companies, oil and gas organizations, and large corporations. The course is suitable for executives, investment managers, portfolio managers, financial analysts, treasury

professionals, risk specialists, and senior decision makers.

Objectives

- Analyze the principles of strategic investment management and their role in achieving long-term financial and organizational objectives during the course.
- Evaluate economic conditions, financial markets, and major investment drivers that influence strategic investment decisions.
- Develop investment objectives and strategies based on expected return, risk tolerance, investment horizon, liquidity requirements, and institutional constraints.
- Design strategic and tactical asset allocation frameworks aligned with investor objectives and changing market conditions.
- Apply diversification, correlation, and concentration management techniques to improve portfolio structure.
- Assess market, credit, liquidity, currency, counterparty, and concentration risks within investment portfolios.
- Develop investment policies and governance frameworks defining responsibilities, limits, controls, and decision-making processes.
- Apply scenario analysis, sensitivity analysis, and stress testing to evaluate portfolio resilience under adverse conditions.
- Evaluate portfolio performance using absolute, relative, benchmark-based, and risk-adjusted measures.
- Develop systematic portfolio rebalancing approaches based on changes in market conditions, risk exposures, and investment objectives.
- Improve executive investment reporting through relevant portfolio, risk, and performance indicators.
- Align strategic investment management with capital allocation, governance, financial sustainability, and long-term value creation.

Who Should Attend

This course is designed for professionals working in investment management, asset management, portfolio management, treasury, corporate finance, investment research, and investment risk management. It is particularly relevant to Investment Managers, Asset Managers, Portfolio Managers, Investment Analysts, Asset Allocation Specialists, Treasury Managers, Financial

Analysts, Investment Risk 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 Investment, 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, insurance companies, oil and gas organizations, infrastructure organizations, and large corporations can benefit from the frameworks covered in this course.

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

Learning Outcomes

- Explain advanced principles of strategic investment management and their relationship with organizational financial objectives.
- Analyze economic conditions, market trends, and major factors affecting investment decisions.
- Translate investment objectives into clear strategies, policies, risk parameters, and measurable targets.
- Develop asset allocation strategies aligned with risk tolerance, liquidity requirements, investment horizons, and institutional constraints.
- Construct diversified investment portfolios and manage concentration and correlation risks.
- Assess market, credit, liquidity, currency, counterparty, and concentration risks across portfolios.
- Apply scenario analysis, sensitivity analysis, and stress testing to evaluate investment portfolio resilience.
- Evaluate portfolio performance using absolute, relative, benchmark-based, and risk-adjusted measures.
- Analyze the contribution of asset allocation and investment selection to overall portfolio results.

- Develop practical portfolio rebalancing frameworks that respond to changing market conditions and investment objectives.
- Prepare executive-level investment reports covering performance, risk, market outlook, opportunities, and recommended actions.
- Develop an integrated strategic investment management framework linking investment objectives, asset allocation, risk management, governance, performance, and implementation.

Course Outline

DAY 01

Strategic Investment Management Foundations and Market Analysis

- Strategic role of investment management in long-term value creation
- Relationship between investment strategy, financial objectives, and institutional priorities
- Investment objectives, risk tolerance, investment horizon, liquidity needs, and constraints
- Economic cycles and their influence on investment markets
- Impact of inflation, interest rates, monetary policy, and economic growth
- Analysis of major asset classes and their investment characteristics
- Identifying investment opportunities and strategic risks
- Building a structured investment decision-making framework

PRACTICAL APPLICATION

Analyze an investment environment and identify the key opportunities, risks, and economic factors affecting strategic investment decisions

DAY 02

Strategic Asset Allocation and Investment Strategy Development

- Principles of strategic asset allocation
- Tactical asset allocation and market opportunity management
- Determining appropriate allocations across major asset classes

DAY 02 — CONTINUED

- Diversification and correlation analysis
- Managing portfolio concentration and exposures
- Balancing expected return, risk, and liquidity
- Developing investment policies, limits, and portfolio constraints
- Benchmark selection and performance objectives

PRACTICAL APPLICATION

Develop a strategic asset allocation framework based on defined investment objectives, risk parameters, liquidity needs, and market expectations

DAY 03

Investment Risk Management, Scenario Analysis and Portfolio Resilience

- Identifying and measuring investment portfolio risks
- Market, credit, liquidity, currency, and counterparty risk
- Concentration risk and correlated exposures
- Volatility, drawdown, and downside risk analysis
- Establishing risk limits and key risk indicators
- Scenario analysis under alternative economic and market conditions
- Stress testing and sensitivity analysis
- Developing strategic risk response and mitigation approaches

PRACTICAL APPLICATION

Conduct a comprehensive portfolio stress test and evaluate the impact of alternative scenarios on returns, liquidity, risk, and investment objectives

DAY 04

Investment Selection, Portfolio Management and Performance Improvement

- Investment research and security selection
- Relationship between investment selection and overall portfolio strategy
- Portfolio monitoring and asset allocation management
- Absolute and relative performance measurement
- Risk-adjusted performance evaluation
- Performance attribution by asset allocation and investment selection
- Portfolio rebalancing and strategic adjustment triggers
- Liquidity management and future cash flow requirements

PRACTICAL APPLICATION

Review an investment portfolio, assess performance and risk, and develop a rebalancing and improvement strategy

DAY 05

Investment Governance, Executive Strategy and Long-Term Portfolio Management

- Investment governance and responsibilities of investment committees and senior management
- Investment policies, controls, limits, and compliance mechanisms
- Linking investment strategy with capital allocation and liquidity management
- Managing investment strategy in uncertain and changing environments
- Executive investment reporting and portfolio dashboards
- Reviewing investment strategy and measuring progress against objectives
- Continuous improvement of investment policies and portfolio structures
- Managing changes in investor objectives, market conditions, and institutional constraints
- Using investment analysis to support executive capital allocation decisions

DAY 05 — CONTINUED

FINAL WORKSHOP

Develop and present a comprehensive Strategic Investment Management strategy covering market analysis, investment objectives, asset allocation, diversification, investment selection, risk management, liquidity, performance measurement, portfolio rebalancing, governance, reporting, and implementation priorities

Register or Request More Information

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

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