



International Training
Center Paris

TRAINING SCHEDULE

Phone: +33 6 59 26 89 09

E-mail: Info@itcparis.com

Address: 78, Avenue des Champs-Élysées, 75008 Paris

PORTFOLIO MANAGEMENT AND ASSET ALLOCATION TRAINING

Overview:

Portfolio Management and Asset Allocation training program is designed to provide participants with a comprehensive understanding of portfolio management and asset allocation strategies. The program covers key topics such as portfolio theory, risk management, asset allocation, and investment strategies. Participants will learn how to design and manage investment portfolios to achieve their investment goals while managing risk effectively.

Objectives:

- Understand the basics of portfolio management and asset allocation
- Learn how to design and manage investment portfolios to achieve investment goals
- Understand the different types of investment products and their characteristics
- Understand the principles of risk management and how to manage risk effectively
- Learn how to develop asset allocation strategies that suit investment goals and risk tolerance
- Understand the different investment strategies and how to choose the best one for a given investment goal

Overall, this Portfolio Management and Asset Allocation training program is designed to provide participants with a comprehensive understanding of portfolio management and asset allocation strategies. The program is suitable for investment professionals, financial advisors, and anyone involved in managing investment portfolios. The program combines theoretical knowledge with practical application, providing participants with the skills and knowledge they need to design and manage investment portfolios that meet their investment goals and risk tolerance. The program will help participants gain a deeper understanding of investment products, risk management, and investment strategies, enabling them to make informed investment decisions.

This Portfolio Management and Asset Allocation training program covers key portfolio management concepts, including asset allocation, risk management, and investment strategies. Participants will learn how to design and manage investment portfolios that meet their investment objectives and constraints. The program also covers performance measurement and evaluation, as well as behavioral finance and its impact on investment decisions. The program is designed to be highly interactive, with case studies and exercises to help participants apply their learning in real-world situations. The program is suitable for investment professionals, financial advisors, and anyone involved in managing investment portfolios.

Targeted Groups:

- Portfolio managers
- Investment analysts
- Wealth managers
- Financial advisors
- Professionals responsible for optimizing investment portfolios

Planning:

Day 1: Introduction to Portfolio Management and Asset Allocation

- Introduction to portfolio management
- Understanding investment objectives and constraints
- Asset allocation strategies
- Portfolio construction and optimization

Day 2: Risk Management and Investment Products

- Principles of risk management
- Types of investment products and their characteristics
- Equity and fixed-income investments
- Alternative investments and derivatives

Day 3: Performance Measurement and Evaluation

- Measuring portfolio performance
- Evaluating portfolio performance
- Performance attribution
- Monitoring and rebalancing portfolios

Day 4: Investment Strategies

- Active vs. passive investment strategies
- Value vs. growth investing
- Momentum investing
- Factor investing

Day 5: Behavioral Finance and Case Studies

- Introduction to behavioral finance
- The psychology of investing
- Behavioral biases and their impact on investment decisions
- Case studies in portfolio management and asset allocation