



*Training Course:
Instruments, Performance, Benchmarks and
Strategies*

*15 - 19 September 2025
Lisbon (Portugal)*

Training Course: Instruments, Performance, Benchmarks and Strategies

Training Course code: FI2055 From: 15 - 19 September 2025 Venue: Lisbon (Portugal) - Training Course Fees: 5750 € Euro

Introduction

A comprehensive guide to alternative investments that reveals today's latest research and strategies

Historically low interest rates and bear markets in world stock markets have generated intense interest in alternative investments. With returns in traditional investment vehicles relatively low, many professional investors view alternative investments as a means of meeting their return objectives. Alternative Investments: Instruments, Performance, Benchmarks, and Strategies, can put you in a better position to achieve this difficult goal.

Part of the Robert W. Kolb Series in Finance, Alternative Investments provides an in-depth discussion of the historic performance, benchmarks, and strategies of every major alternative investment market. With contributions from professionals and academics around the world, it offers valuable insights into the latest trends, research, and thinking in each major area. Empirical evidence about each type of alternative investment is featured, with research presented in a straightforward manner.

Objective

- Examines a variety of major alternative asset classes, from real estate, private equity, and commodities to managed futures, hedge funds, and distressed securities
- Provides detailed insights on the latest research and strategies, and offers a thorough explanation of historical performance, benchmarks, and other critical information
- Blends knowledge from the conceptual world of scholars with the pragmatic view of practitioners in this field

Alternative investments provide a means of diversification, risk control, and return enhancement and, as such, are attractive to many professional investors. If you're looking for an effective way to hone your skills in this dynamic area of finance, look no further than this book.

Outlines

Day 1: Introduction 1:

- Alternative Investments: An Overview
- The Role of Alternative Investments in Strategic Asset Allocation
- Trends in Alternative Investments
- Alternative Investments and Due Diligence

Day 2: Real Estate

- REITs and the Private Real Estate Market
- Commercial Real Estate
- Real Estate Investment Trusts
- Mortgaged-Backed Securities
- Mezzanine Debt and Preferred Equity in Real Estate
- Real Estate Appraisal and Valuation
- Performance of Real Estate Portfolios

Day 3: Private Equity

- Venture Capital
- Mezzanine Capital
- Buyout Funds
- Distressed Debt Investing
- Performance of Private Equity
- Private Equity: Risk and Return Profile

Day 4: Commodities and Managed Futures

- Investing in Commodities
- Performance of Commodities
- Commodity Futures and Strategic Asset Allocation
- Managed Futures: Markets, Investment Characteristics, and Role in a Portfolio
- An Overview of Managed Futures Performance: 1983 to Post-2008 Credit Crisis

Day 5: Hedge Funds

- Investing in Hedge Funds
- Performance of Hedge Funds

- Hedge Funds and Risk Management
- Hedge Funds and the Financial Crisis
- Hedge Funds: Replication and Nonlinearities
- Fund-of-Funds: A Tale of Two Fees

Registration form on the Training Course: Instruments, Performance, Benchmarks and Strategies

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