



*Training Course:
Investment Management & Analysis*

*10 - 14 May 2027
Lisbon (Portugal)*

Training Course: Investment Management & Analysis

Training Course code: MA234691 From: 10 - 14 May 2027 Venue: Lisbon (Portugal) - Training Course Fees: 6050 € Euro

Introduction

In today's complex and volatile financial environment, effective investment management requires a strong understanding of financial markets, asset classes, and analytical techniques. The [Investment Management & Analysis](#) program is designed to equip participants with the knowledge and tools needed to evaluate investment opportunities, manage portfolios, and optimize returns while controlling risk.

This program provides a comprehensive overview of investment strategies, portfolio construction, risk management, and performance evaluation, enabling participants to make informed, data-driven investment decisions across different market conditions.

Course Objectives

By the end of this program, participants will be able to:

- Understand key concepts and structures of financial markets and investment products
- Analyze different asset classes including equities, bonds, and derivatives
- Apply portfolio management techniques to optimize risk and return
- Evaluate investment opportunities using financial and analytical tools
- Measure and manage investment risk effectively
- Apply fundamental and technical analysis methods
- Understand active and passive investment strategies
- Evaluate portfolio performance using key financial metrics
- Develop and implement investment strategies aligned with objectives

Target Audience

This program is designed for:

- Investment Analysts and Portfolio Managers
- Finance and Treasury Professionals
- Banking and Financial Institution Staff
- Wealth Management and Asset Management Professionals
- Business and Strategy Professionals involved in investment decisions
- Individuals seeking to enhance investment knowledge and analytical skills

Outline

Day 1 - Financial Markets and Investment Instruments

- Overview of global financial markets
- Asset classes: equities, bonds, derivatives, and alternative investments
- Market indices and benchmarks
- Risk and return fundamentals
- Investment vehicles and instruments

Day 2 - Portfolio Management and Asset Allocation

- Principles of portfolio construction
- Risk-return trade-off and diversification
- Modern Portfolio Theory MPT
- Capital Asset Pricing Model CAPM
- Strategic vs. tactical asset allocation

Day 3 - Investment Analysis Techniques

- Fundamental analysis financial statements, valuation methods
- Technical analysis charts, indicators, trends
- Macroeconomic and sector analysis
- Identifying investment opportunities
- Market timing vs. long-term investing

Day 4 - Risk Management and Derivatives

- Types of financial risks market, credit, liquidity
- Risk measurement techniques
- Introduction to derivatives futures, options
- Hedging strategies and portfolio protection
- Managing portfolio volatility

Day 5 - Performance Evaluation and Investment Strategies

- Measuring investment performance
- Risk-adjusted return metrics Sharpe Ratio, Jensen's Alpha, etc.
- Benchmarking and performance attribution
- Active vs. passive investment strategies
- Developing and implementing investment strategies

Registration form on the Training Course: Investment Management & Analysis

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Complete & Mail or fax to Global Horizon Training Center (GHTC) at the address given below

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