Strategic Investment Management

INTRODUCTION

- Strategic Investment Management is one of the most important factors that determines the long-term performance of any investment. With a rapidly changing investment environment, highly volatile markets, pandemic situation (SARS and COVID-19), technological revolution and frequent financial crises, it is vital to understand the emerging drivers of Securities, REIT (residential, commercial, and industrial), new projects, new companies, other assets and more recently the concept of sustainable investments. Selecting the winning investment management strategy is crucial to maintain a resilient portfolio in the current volatile market.
- professional development training courses in Strategic Investment Management provide a unique opportunity to current/potential investors and financial analysts to understand the contemporary investment strategies. This training course reveals the strategies that consistently beat the market including momentum trading and contrarian investments. Furthermore, delegates will learn about active and passive management techniques, how to use derivatives to protect their portfolios, how to develop their key performance indicators, fundamental indexation, how to identify high growth sectors, and market sentiment. This training course is pitch to both individual and institutional investors.

This Strategic Investment Management training course will highlight:

- The Current Investment Environment and Asset Allocation Strategies
- Inefficient Markets
- Application of Financial Derivatives
- Portfolio Management & Performance Measures
- Recent Developments and Personal Finance

OBJECTIVES

- This training course has been designed to provide you with up-to-date knowledge and practical skills in investment management.

At the end of this training course, you will learn to:

- Demonstrate competence in applying modern portfolio theory to security analysis and portfolio management in the real world
- Use a variety of financial instruments, including an array of derivatives to hedge, speculate and take advantage of market arbitrage situations
- Construct portfolio management strategies using a variety of assets and derivative instruments
- Demonstrate the application of the techniques involved in portfolio management and strategic development
- Demonstrate an understanding of the role of investment companies in portfolio management, and the techniques involved in portfolio performance evaluation
- Demonstrate an understanding of current market dynamics

TRAINING METHODOLOGY

- This Strategic Investment Management training course will be structured as a highly participative workshop with formal presentations, latest research articles, interactive worked examples and simulations. Relevant examples and empirical studies are provided to illustrate the application of each of the topics covered and opportunities are provided to learn and apply the key investment strategies.

ORGANISATIONAL IMPACT

- The organisation will benefit from the development and practical application of advanced skills in financial market risk as well as from raised awareness of important recent developments in financial management.

  Specific benefits for the organisation include:

- Up to date knowledge of the current market dynamics
- Development of skills in critical analysis and interpretation of financial innovations and risks
- Raised awareness of new financial opportunities
- Ability to build a winning portfolio
- Advanced practical skills in financial forecasting

PERSONAL IMPACT

Participants will benefit from updated knowledge and practical skills in financial management that will allow them to make a greater contribution to the development and improvement of investments whilst at the same time enhancing their own career development potential. Participants will have:

- Deeper understanding of how the financial market operates
- The ability to make financial decisions in a volatile market
- A good understanding around existing and upcoming financial products
- A better understanding of the current market trend
- Knowledge about financial management

WHO SHOULD ATTEND?

- This training course would be relevant to all of those involved in (or planning to join) making investment decisions. This includes private individuals, financial and non-financial institutions, non-profit organizations and government.

This training course is suitable to a wide range of professionals but will greatly benefit:

- Financial Accounting Team Members
- Financial Planning and Budgeting Professionals
- Strategic Planning and Head Office Team Members
- Corporate Communication and Investor Relations Professionals
- Investment Analysts and Advisers
- Traders
- Investors in general

Course Outline

The Current Investment Environment and Asset Allocation Strategies

- Investment Opportunities
- Required Rate of Return
- Sustainable Investment Strategies
- Risk and Return
- Portfolio Theory
- Capital Market Theory
- Asset Pricing Models

Inefficient Markets

- Efficient Market Hypothesis
- Market Anomalies
- Environmental Finance
- Behavioural Finance
- Equity Valuation Models
- Extreme Portfolio Selection (Momentum and Contrarian Trading)
- Financial Crises and Pandemics (SARS and COVID-19)
- Noise Trading

Application of Financial Derivatives

- Bond Pricing
- Interest Rate Risk Management
- Derivative Instruments
- Forward, Futures and Options
- Fixed Income Portfolio Management
- Passive Bond Portfolio Strategies
- Matched-Funding Techniques
- Active Bond Management Strategies
- Buy Write Strategy

Portfolio Management & Performance Measures

- Passive Equity Portfolio Management Strategies
- Active Equity Portfolio Management Strategies
- Top-Down Investment Process
- Strategic Asset Allocation
- Tactical Asset Allocation
- Style Investing
- Value versus Growth
- Hedging Portfolios
- Islamic and Conventional Fund Management

Recent Developments and Personal Finance

- Brexit
- Multilateral Trading Systems
- Financial Consequences of Terrorism
- Natural Disasters and Financial Markets
- Energy Markets
- Personal Finance