MAWA EVENTS

Address: No. 857, Block A2. Leisure Commerce Square - No 9., 46150 Petaling Jaya, Selangor, Malaysia

Phone: +601116373203 | **Email:** info@mawaevents.net

CONSTRUCTING AND MANAGING EQUITY PORTFOLIOS

""Strategies for Building High-Performance Equity Portfolios in Dynamic Markets""

Schedule

Date	Venue	Fees (Face-to-Face)
16 – 20 Nov 2026	Dubai, UAE	USD 3495 per delegate

► **Available delivery methods:** Face-to-Face & Online Training

Introduction

In today's complex and rapidly evolving capital markets, equity portfolio managers must blend analytical skill with disciplined strategy to generate superior risk-adjusted returns. With increasing volatility, global interconnectedness, and the rise of quantitative tools and ESG considerations, the ability to construct and manage equity portfolios effectively has become a vital competency for investment professionals.

This intensive 5-day course offers a practical, hands-on guide to building, analyzing, and managing diversified equity portfolios. Participants will explore modern portfolio theory, valuation techniques, portfolio construction strategies, and performance evaluation tools. Real-world simulations and market case studies are used to translate theory into actionable investment decisions.

Objectives

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

- Understand key equity asset classes, styles, and factors
- Apply top-down and bottom-up portfolio construction methodologies
- Use valuation models and stock screening techniques
- Monitor, rebalance, and evaluate portfolio performance
- Manage portfolio risk through diversification, hedging, and asset allocation

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Why Attend

- Enhance your ability to construct well-diversified equity portfolios
- Align investment strategies with client mandates and market conditions
- Integrate valuation, risk analysis, and behavioral finance into portfolio decisions
- Strengthen your approach to performance tracking and attribution
- Gain insights into global equity trends and ESG integration practices

Target Audience

This program is designed for:

- Portfolio Managers and Buy-Side Analysts
- Private Wealth Managers and Family Office Advisors
- Investment Strategists and Equity Traders
- Financial Analysts, CFA candidates, and Risk Officers
- Institutional Investors and Asset Management Professionals

Individual Benefits

Key competencies that will be developed include:

- Fundamental and technical equity analysis
- Portfolio construction using growth, value, income, or multi-style approaches
- Risk-adjusted performance evaluation and benchmark comparison
- Factor-based and quantitative screening methods
- Strategic rebalancing and tax-aware investing

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Improved equity investment decision-making and portfolio quality
- Higher consistency in meeting client or institutional mandates
- Enhanced ability to respond to market shifts and risk exposures
- More robust portfolio reporting, oversight, and compliance
- Support for long-term capital preservation and alpha generation

Instructional Methodology

The course follows a blended learning approach combining theory with practice:

- Strategy Briefings – Core equity investment principles and portfolio theories
- Case Studies – Real fund strategies, stock selection errors, and market rotations
- Workshops – Portfolio design, risk factor analysis, and valuation modeling
- Peer Exchange – Asset allocation debates and model comparisons
- Tools – Model templates, tracking dashboards, risk matrices

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Course Outline

DETAILED 5-DAY COURSE OUTLINE

Training Hours: 07:30 AM – 03:30 PM **Daily Format:** 3–4 Learning Modules | Coffee breaks: 09:30 & 11:15 | Lunch Buffet: 01:00 – 02:00

Day 1: Equity Markets and Investment Philosophies

- Module 1: Overview of Equity Markets and Instruments (07:30 – 09:30) • Global equity markets, indices, and instruments (ETFs, ADRs, etc.) • Difference between passive and active equity strategies
- Module 2: Investment Styles and Philosophies (09:45 – 11:15) • Value, growth, dividend, GARP, momentum, and ESG styles
- Module 3: Equity Research and Screening (11:30 – 01:00) • Quantitative filters, sector selection, and fundamental screens
- Module 4: Workshop – Stock Screening Exercise (02:00 – 03:30) • Using criteria to build a universe of investment candidates

Day 2: Security Analysis and Valuation Techniques

- Module 5: Financial Statement and Ratio Analysis (07:30 – 09:30) • Earnings quality, margins, leverage, and growth indicators
- Module 6: Valuation Models and Relative Valuation (09:45 – 11:15) • DCF, P/E, EV/EBITDA, P/B, PEG ratio and multiples
- Module 7: Behavioral Biases in Equity Investing (11:30 – 01:00) • Overconfidence, herding, loss aversion, and confirmation bias
- Module 8: Workshop – Valuation of a Selected Stock (02:00 – 03:30) • Case analysis and peer presentation

Day 3: Portfolio Construction Strategies

- Module 9: Diversification and Risk Concepts (07:30 – 09:30) • Systematic vs. unsystematic risk, correlation, and beta
- Module 10: Modern Portfolio Theory and Asset Allocation (09:45 – 11:15) • Efficient frontier, CAPM, Sharpe and Sortino ratios
- Module 11: Core-Satellite and Factor-Based Portfolios (11:30 – 01:00) • Smart beta, low volatility, quality, and momentum strategies
- Module 12: Workshop – Portfolio Design Simulation (02:00 – 03:30) • Group exercise to build and justify a model equity portfolio

Day 4: Portfolio Monitoring, Rebalancing and ESG Integration

- Module 13: Performance Evaluation and Attribution (07:30 – 09:30) • Alpha, beta, tracking error, and performance attribution models
- Module 14: Portfolio Rebalancing and Risk Controls (09:45 – 11:15) • Tactical adjustments, threshold triggers, and risk limits
- Module 15: ESG in Portfolio Construction (11:30 – 01:00) • Incorporating sustainability, governance, and impact metrics
- Module 16: Workshop – Attribution Analysis (02:00 – 03:30) • Peer review of sample portfolios and attribution breakdown

Day 5: Strategic Implementation and Final Assessment

- Module 17: Portfolio Simulation Capstone (07:30 – 09:30) • Building a multi-stock portfolio and justifying allocation
- Module 18: Risk Scenarios and Stress Testing (09:45 – 11:15) • Scenario planning, market shock analysis, and hedging
- Module 19: Investment Committee Presentation (11:30 – 01:00) • Group presentations simulating real-world review panels
- Module 20: Final Feedback and Certification (02:00 – 03:30) • Personal action plan and course wrap-up

Certification

Participants will receive a Certificate of Completion in Constructing and Managing Equity Portfolios, validating their knowledge of portfolio theory, valuation, and equity investment strategy formulation.

Why Choose MAWA Events

- **Global Expertise:** More than 17 years of experience in professional training and consulting.
- **Industry-Leading Faculty:** Courses delivered by seasoned professionals with hands-on experience.
- **Practical Insights:** Learn to turn theory into actionable strategies for real-world business impact.
- **Client-Focused Solutions:** Customized programs designed to achieve your organisation’s unique goals.

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