MAWA EVENTS

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INNOVATIVE PORTFOLIO MANAGEMENT STRATEGIES

"Designing Adaptive, Diversified, and High-Performance Portfolios for a Changing World"

Schedule

Venue (InHouse)	Fees
At Your Organization Premises	Ask For The Quotation

► **Available delivery methods:** In-House Training

Introduction

This 5-day advanced training equips investment professionals with modern techniques and frameworks for managing portfolios in increasingly complex and volatile markets. The course focuses on innovation in asset allocation, diversification strategies, portfolio optimization, and performance monitoring.

Participants will gain practical tools to build robust portfolios that adapt to macroeconomic shifts, client needs, and risk constraints—combining traditional theories with real-world execution using quantitative and qualitative insights.

Objectives

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

- Apply strategic, tactical, and dynamic asset allocation frameworks
- Incorporate alternative and ESG assets into portfolios
- Utilize risk-adjusted performance measures for portfolio optimization
- Implement factor-based, thematic, and smart beta strategies
- Apply technology and analytics in modern portfolio construction

Why Attend

- Explore cutting-edge portfolio management practices and trends
- Learn to balance innovation with fiduciary responsibilities
- Gain insight into how institutions structure resilient portfolios
- Get hands-on practice with tools for optimization and rebalancing
- Understand how to integrate ESG, alternatives, and behavioral models

Target Audience

- Portfolio and Fund Managers
- Wealth Managers and Private Bankers
- Investment Analysts and Strategists
- CIOs, CFOs, and Institutional Investors
- Risk Management and Compliance Professionals
- Financial Consultants and Planners

Individual Benefits

- Deeper strategic thinking around asset allocation
- Ability to design resilient, goal-based investment portfolios
- Enhanced use of modern risk-return tools and benchmarks
- Exposure to fintech solutions for portfolio analytics and reporting

Organizational Benefits

- More agile and competitive investment products
- Greater alignment with evolving client expectations and market shifts
- Improved risk control and governance over portfolio performance
- Stronger analytical capabilities for investment teams

Instructional Methodology

- Expert Lectures – Best practices and institutional case studies
- Interactive Simulations – Allocation and optimization exercises
- Workshops – Real-world client portfolio design
- Group Discussions – Peer strategies and challenges
- Portfolio Lab – Use of modern tools (Excel, Bloomberg models, etc.)

Course Outline

DETAILED 5-DAY COURSE OUTLINE (Customizable) Training Hours: 07:30 AM – 03:30 PM Daily Format: 3–4 Modules | Coffee breaks: 09:30 & 11:15 | Lunch Buffet: 01:00 – 02:00

Day 1: Portfolio Strategy Foundations & Trends

- Module 1: Modern Portfolio Theory vs. Post-Modern Approaches
- Module 2: Strategic vs. Tactical vs. Dynamic Allocation
- Module 3: Market Trends Reshaping Investment Strategy (AI, ESG, Demographics)
- Module 4: Case Study – Comparing Traditional & Innovative Portfolios

Day 2: Diversification Beyond the Basics

- Module 5: Cross-Asset Correlation & Volatility Clustering
- Module 6: Use of Alternatives (Private Equity, Commodities, Infrastructure)
- Module 7: ESG and Impact Investing in Portfolios
- Module 8: Simulation – Building a Diversified Multi-Asset Portfolio

Day 3: Advanced Risk & Performance Management

- Module 9: Risk Budgeting & Attribution Analysis
- Module 10: Tracking Error, Value at Risk (VaR), Conditional VaR
- Module 11: Performance Benchmarks, Alpha/Beta Decomposition
- Module 12: Stress Testing and Scenario Analysis Tools

Day 4: Factor Investing and Smart Strategies

- Module 13: Understanding Investment Factors (Value, Momentum, Quality)
- Module 14: Designing Factor-Based Portfolios
- Module 15: Smart Beta and Thematic ETFs
- Module 16: Portfolio Rebalancing & Tax-Aware Strategies

Day 5: Simulation, Innovation, and Final Presentations

- Module 17: Portfolio Management Simulation Challenge
- Module 18: Technology in Portfolio Design (Excel, APIs, Robo-Advisors)
- Module 19: Group Presentations – Innovative Client Portfolio Solutions
- Module 20: Wrap-Up, Lessons Learned, and Action Planning

Certification

Participants will receive a Certificate of Completion in Innovative Portfolio Management Strategies, validating their expertise in designing and managing modern investment portfolios.

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.

In-House / Customized Training	TEL:	EMAIL:
Interested in running this course for your team? Please contact us:	**+601116373203**	**info@mawaevents.net**