

# STRATEGIC ASSET ALLOCATION TECHNIQUES FOR INVESTMENT SUCCESS

*“Build Resilient Portfolios with Proven Allocation Frameworks”*

## Schedule

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

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

## Introduction

Strategic asset allocation is the cornerstone of long-term investment success. By aligning portfolio structures with investment goals, risk appetite, and market cycles, asset allocators can significantly enhance risk-adjusted returns. This course provides a comprehensive framework for designing and managing robust strategic allocation plans that serve as the foundation for performance, diversification, and sustainability.

Participants will explore key theories, asset classes, quantitative tools, and governance structures needed to construct, implement, and monitor effective asset allocation strategies.

## Objectives

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

- Understand the role of strategic asset allocation in long-term investment success
- Analyze the characteristics and behavior of various asset classes
- Define asset allocation models based on investor profiles and objectives
- Apply optimization techniques using quantitative tools and risk-return frameworks
- Integrate ESG, liquidity, and geopolitical risks into allocation decisions
- Evaluate performance attribution and rebalancing techniques

## Why Attend

- Learn to structure resilient portfolios across varying market regimes
- Gain insight into the interplay between macroeconomics and asset returns
- Understand advanced risk-based and factor-based allocation approaches
- Improve governance and monitoring of portfolio strategies
- Enhance your decision-making with data-driven tools and techniques

## Target Audience

- Investment Professionals & Fund Managers
- Wealth Managers & Financial Advisors
- Pension Fund & Sovereign Wealth Fund Officers
- Portfolio Managers
- Risk Management Teams
- Institutional Investors & Family Office Representatives

## Individual Benefits

- Deepen your understanding of portfolio construction and diversification
- Learn to use Excel-based and software-supported optimization models
- Improve your ability to communicate allocation decisions to clients or boards
- Stay ahead of market trends with modern, research-backed approaches

## Organizational Benefits

- Improve strategic decision-making for long-term fund allocation
- Enhance investment governance and policy development
- Increase consistency in portfolio performance across cycles
- Integrate non-financial and sustainable factors into investment strategy

## Instructional Methodology

- Expert-led presentations and case-based discussions
- Portfolio allocation simulations using Excel and modeling tools
- Group exercises and interactive workshops
- Real-world investment scenarios and rebalancing drills
- Pre- and post-course diagnostic assessments

## 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: Foundations of Strategic Asset Allocation

- Module 1 (07:30 – 09:30): Investment Objectives, Constraints & Policy Design
- Module 2 (09:45 – 11:15): Strategic vs. Tactical Asset Allocation
- Module 3 (11:30 – 01:00): Overview of Asset Classes: Equities, Bonds, Alternatives

### Day 2: Risk-Return Analysis and Optimization Tools

- Module 4 (07:30 – 09:30): Return Distributions, Risk Metrics & Correlations
- Module 5 (09:45 – 11:15): Modern Portfolio Theory & Efficient Frontier
- Module 6 (11:30 – 01:00): Mean-Variance Optimization Using Excel

### Day 3: Real-World Allocation Frameworks

- Module 7 (07:30 – 09:30): Risk Budgeting and Volatility Targeting
- Module 8 (09:45 – 11:15): Multi-Asset Strategies and Factor Allocation
- Module 9 (11:30 – 01:00): ESG and Thematic Investing in Portfolio Design

### Day 4: Governance, Performance & Rebalancing

- Module 10 (07:30 – 09:30): Portfolio Governance and Investment Policy Statements
- Module 11 (09:45 – 11:15): Rebalancing Approaches and Threshold Models
- Module 12 (11:30 – 01:00): Attribution Analysis and Performance Review

### Day 5: Application, Strategy Design & Case Studies

- Module 13 (07:30 – 09:30): Real-World Asset Allocation Cases (e.g. pension, sovereign funds)
- Module 14 (09:45 – 11:15): Group Workshop: Strategic Allocation Strategy Design
- Module 15 (11:30 – 01:00): Presentations, Action Plans & Certification Ceremony

## Certification

Upon successful participation, attendees will receive a Certificate of Completion: "Strategic Asset Allocation Techniques for Investment Success" – validating skills in designing and executing institutional-quality allocation strategies.

## Why Choose MAWA Events

- **Global Expertise:** More than 17 years of experience in professional training and consulting.
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<p><b>In-House / Customized Training</b></p> <p>Interested in running this course for your team?</p> <p>Please contact us:</p>	<p>TEL:</p> <p><b>+601116373203</b></p>	<p>EMAIL:</p> <p><b>info@mawaevents.net</b></p>
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