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

""Master the Art and Science of Equity Portfolio Construction for Maximum Risk-Adjusted Returns."

Schedule

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

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

Introduction

Effective equity portfolio management is critical for achieving sustainable investment performance. This course provides participants with the knowledge, tools, and techniques required to construct, analyze, and manage equity portfolios in line with investor objectives and risk tolerance.

The program covers portfolio theory, asset allocation, stock selection, performance evaluation, and risk management techniques, integrating both fundamental and quantitative approaches. Participants gain practical skills to optimize portfolios, measure performance, and implement strategies that balance risk and return in dynamic market conditions.

Objectives

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

- Understand key principles of portfolio theory and asset allocation.
- Construct diversified equity portfolios based on risk and return objectives.
- Apply fundamental and quantitative techniques for stock selection.
- Analyze portfolio performance using metrics such as alpha, beta, and Sharpe ratio.
- Implement risk management strategies to mitigate market and sector risks.
- Integrate portfolio management with investor objectives and constraints.
- Make informed decisions in line with global investment standards and best practices.

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Why Attend

Equity portfolio management is a core skill for investment professionals, fund managers, and financial analysts. This course equips participants with practical, market-relevant tools to maximize portfolio returns while controlling risks. It bridges the gap between theory and practice, ensuring participants are prepared for real-world investment challenges.

Target Audience

This course is suitable for:

- Investment and Portfolio Managers
- Financial Analysts and Equity Researchers
- Asset Management Professionals
- Wealth and Private Banking Advisors
- Fund Managers and Risk Analysts
- Finance Professionals aiming to enhance portfolio management expertise

Individual Benefits

- Develop practical skills for constructing and managing equity portfolios.
- Improve decision-making using both fundamental and quantitative analysis.
- Enhance analytical, risk management, and performance evaluation capabilities.
- Increase employability and professional credibility in investment management.
- Gain confidence in making strategic portfolio decisions aligned with client objectives.

Organizational Benefits

- Strengthen investment decision-making and portfolio performance.
- Enhance risk-adjusted returns and reduce portfolio volatility.
- Optimize asset allocation and capital deployment.
- Improve compliance with investment standards and governance.
- Build in-house expertise in equity research and portfolio management.

Instructional Methodology

- Instructor-led lectures and interactive discussions
- Real-world case studies and portfolio simulation exercises
- Workshops on asset allocation, stock selection, and risk management
- Performance analysis using modern portfolio metrics
- Group projects and scenario-based decision-making exercises

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Course Outline

Module 1: Introduction to Portfolio Management Principles

Module 2: Modern Portfolio Theory and Asset Allocation

Module 3: Equity Market Analysis – Fundamental & Technical Approaches

Module 4: Security Selection and Stock Screening Techniques

Module 5: Portfolio Construction and Diversification Strategies

Module 6: Performance Measurement – Alpha, Beta, Sharpe Ratio, and Tracking Error

Module 7: Risk Management – Market, Sector, and Individual Stock Risk

Module 8: Behavioral Finance and Decision Biases in Portfolio Management

Module 9: Portfolio Monitoring, Rebalancing, and Reporting

Module 10: Capstone Project – Designing a Complete Equity Portfolio

Certification

Upon successful completion, participants will receive a Certificate in Constructing and Managing Equity Portfolios, demonstrating their proficiency in equity investment analysis, portfolio construction, and risk-adjusted performance management.

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 Interested in running this course for your team? Please contact us:	TEL: **+601116373203**	EMAIL: **info@mawaevents.net**

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