

€ TRAINING

Asset Management and Best Practices in
Investment Management



13 - 17 May 2024
Lisbon (Portugal)

Asset Management and Best Practices in Investment Management

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Introduction

For an asset management company to be successful, three things are required. First, the company must have an effective investment strategy. Second, the investment strategy must be implemented efficiently. Third, the company must successfully handle the non-investment elements of the business, such as marketing and compliance. This course covers all of these elements, exploring the perspectives of both asset managers and the individuals and institutions that provide capital to the managers. Asset management plays an important role in the economy, facilitating efficient saving for retirement, making financial markets more efficient, and allocating capital to companies and entrepreneurs with valuable ideas.

Course Objectives

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

- Highlight best practices in asset management
- Define important objectives of effective investment policies and implementing them efficiently
- Understand, critique and refine advanced trading strategies used by hedge funds
- Recognize and evaluate key strategies in private capital and venture capital
- Incorporate these specific asset management skills into a broader business plan
- Interact with a leading academic in the asset management field through hand-picked case studies from industry-leading firms
- Discuss the future of the asset management industry, identifying key potential opportunities and risks.

Targeted Audience

- Asset managers are looking to perfect and update their existing skills
- Ambitious Financial Services Managers looking to work in Asset Management
- Current and future portfolio managers in mutual funds, ETFs, hedge funds, private equity, and venture capital investments
- Capital allocations such as pension funds, endowments, sovereign wealth funds, insurance companies, family offices and banks.

Course Outline

Unit 1:

- Definitions and scope of asset management
- Asset management as a business process
- Asset management strategy and planning
- Asset management roles - about roles, expectations and responsibilities
- The international standard for asset management is ISO 55000

Unit 2:

- Asset management policy
- Develop the asset management strategic plans

- Executing the asset management strategic plans
- Long-term maintenance and investment planning
- Information management and configuration

Unit 3:

- Identifying and evaluating asset management risks
- The importance of risk
- Risks at the business level
- Stakeholder risk

Unit 4:

- Types of investment
- The importance of investing in economic development
- Investment principles
- Investment obstacles

Unit 5:

- Understanding of investing in the financial markets
- Differences between stocks and bonds and how to invest in these investment vehicles
- Investment portfolio management
- Investment analysis