MERCURY

Strategic Investment Management

20 – 24 September 2027
London (UK)



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Introduction

The Strategic Investment Management course focuses on building structured approaches to capital allocation and long-term financial decision-making. It provides insight into how investment strategies are developed in corporate and institutional environments. It explores how investment planning aligns with organizational goals and financial sustainability. Participants will examine how risk, return, and market dynamics influence investment outcomes. The program highlights modern methods used in portfolio construction and asset selection. It strengthens the ability to make informed, data-driven investment decisions.

Targeted Groups

This Strategic Investment Management training targets professionals seeking knowledge and skills:

- Finance officers are involved in investment planning.
- Portfolio managers handling asset allocation.
- Business analysts support financial decisions.
- Investment advisors in the corporate or private sectors.
- Banking professionals managing client portfolios.
- Risk management specialists in financial institutions.
- Graduates entering investment or finance careers.
- Executives responsible for capital investment strategy.

Course Objectives

Participants will achieve the following objectives by completing the Strategic Investment Management course:

- Understand core principles of investment strategy and financial planning.
- Analyze capital allocation methods for organizational growth.
- Evaluate investment opportunities using financial analysis tools.
- Apply portfolio management techniques for optimized returns.
- Assess investment risk and develop mitigation approaches.
- Interpret market trends for better investment decision-making.
- Improve asset management practices across investment portfolios.
- Enhance understanding of ROI and performance evaluation metrics.
- Align investment strategies with long-term business goals.
- Strengthen strategic thinking in wealth and asset management.

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Targeted Competencies

Participants will gain the following competencies during the Strategic Investment Management program:

- Ability to design structured investment strategies.
- Skills in evaluating financial performance indicators.
- Competence in portfolio diversification techniques.
- Understanding of investment risk assessment models.
- Ability to manage capital allocation efficiently.
- Skills in interpreting financial reports and data.
- Competence in applying strategic investment frameworks.
- Ability to optimize investment outcomes and ROI.
- Strong analytical thinking for financial decision-making.

Studying Scenarios

In this Strategic Investment Management training, participants develop skills through the following scenarios:

- Building an investment strategy for corporate expansion projects.
- Evaluating portfolio performance under changing market conditions.
- Allocating capital across multiple high-risk investment options.
- Managing investment risks during periods of economic uncertainty.
- Comparing asset classes to optimize a diversification strategy.
- Designing a long-term financial plan for organizational growth.

Course Content

Unit 1: Foundations of Strategic Investment Management

- Introduction to strategic investment management concepts.
- Understanding investment strategy and financial planning basics.
- Overview of capital allocation in organizations.
- Role of investment decision-making in business growth.
- Key principles of asset management and wealth creation.
- Importance of long-term investment thinking.
- Overview of global investment environments and trends.
- Relationship between risk, return, and investment strategy.

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Unit 2: Investment Analysis and Financial Evaluation

- Fundamentals of financial analysis in investment decisions.
- Understanding investment evaluation techniques and tools.
- Assessing financial statements for investment insights.
- Applying ROI and profitability analysis methods.
- Evaluating market conditions for investment opportunities.
- Identifying investment risks through quantitative analysis.
- Using financial indicators for strategic decision-making.
- Comparing investment alternatives for optimal outcomes.

Unit 3: Portfolio Construction and Diversification

- Principles of portfolio management and structure design.
- Building diversified investment portfolios for stability.
- Balancing risk and return in portfolio construction.
- Selecting asset classes for effective diversification.
- Applying strategic asset allocation methods.
- Managing portfolio rebalancing techniques over time.
- Understanding the correlation between different investment assets.
- Enhancing long-term portfolio performance strategies.

Unit 4: Risk Management and Capital Allocation

- Introduction to investment risk management frameworks.
- Identifying types of financial and market risks.
- Developing strategies for risk mitigation in investments.
- Allocating capital based on risk-return analysis.
- Understanding investment risk assessment techniques.
- Managing uncertainty in financial decision making.
- Applying controls for investment loss reduction.
- Optimizing capital allocation for sustainable returns.

Unit 5: Performance Measurement and Strategic Review

- Measuring investment performance using key metrics.
- Evaluating portfolio returns and benchmark comparisons.
- Assessing investment efficiency and financial outcomes.
- Reviewing strategic investment management decisions.
- Monitoring long-term asset performance trends.
- Applying financial KPIs for investment evaluation.
- Improving investment strategy through performance feedback.
- Enhancing continuous improvement in investment planning.

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Final Insights & Key Takeaways

Strategic Investment Management builds the ability to connect financial analysis with long-term investment planning. It strengthens decision-making capabilities for sustainable portfolio growth and risk-balanced returns.