MERCURY

Professional Investment & Portfolio Management Practices

23 – 27 August 2027
Kigali (Rwanda)



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Introduction

The Professional Investment & Portfolio Management Practices course provides participants with an understanding of modern investment principles, portfolio construction methods, and asset management strategies. It explores the frameworks used by investment professionals to evaluate opportunities, manage risks, and optimize portfolio performance. It covers essential concepts, including investment analysis, asset allocation, diversification techniques, financial markets, and portfolio monitoring. Participants will examine how investment decisions are developed through structured evaluation processes and data-driven financial insights. The program focuses on strengthening the practical knowledge required to manage investment portfolios across different market conditions. It highlights the importance of strategic planning, risk control, and performance measurement in achieving long-term investment objectives.

Targeted Groups

This Professional Investment & Portfolio Management Practices training targets professionals seeking knowledge and skills:

- Investment managers develop portfolio strategies and investment decisions.
- Financial analysts improve investment evaluation and market analysis skills.
- Banking professionals enhance asset management knowledge.
- Wealth managers supporting client investment planning.
- Finance professionals managing corporate investment activities.
- Portfolio specialists seeking advanced investment management practices.
- Risk professionals understand investment risk control methods.
- Business leaders evaluate strategic investment opportunities.

Course Objectives

Participants will achieve the following objectives by completing the Professional Investment & Portfolio Management Practices course:

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- Understand the fundamental principles of investment management and portfolio development.
- Analyze financial markets and evaluate different investment opportunities effectively.
- Apply asset allocation strategies to achieve balanced portfolio performance.
- Develop knowledge of portfolio diversification and investment risk management techniques.
- Evaluate securities using structured financial analysis approaches.
- Understand the relationship between risk, return, and investment decision-making.
- Apply portfolio monitoring methods to assess investment performance.
- Identify factors influencing market movements and investment outcomes.
- Develop strategies for managing equity, fixed income, and alternative investments.
- Understand investment valuation concepts and financial forecasting methods.
- Improve decision-making skills through analytical investment frameworks.
- Evaluate portfolio performance using relevant measurement indicators.
- Apply professional practices for long-term investment planning and management.

Targeted Competencies

Participants will gain the following competencies during the Professional Investment & Portfolio Management Practices program:

- Analyze investment opportunities effectively.
- Understand portfolio construction principles.
- Manage risks through diversification.
- Interpret market trends and indicators.
- Evaluate portfolio performance.
- Develop investment strategies.
- Understand securities valuation.
- Support investment decisions.

Studying Scenarios

In this Professional Investment & Portfolio Management Practices training, participants develop skills through the following scenarios:

- An investment team analyzes market conditions to develop portfolio allocation strategies.
- A financial advisor evaluates client objectives to design suitable investment plans.
- Portfolio managers review asset performance and adjust investment strategies.
- Analysts assess securities using financial indicators and valuation methods.
- Organizations evaluate investment risks before making strategic financial decisions.

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Course Content

Unit 1: Fundamentals of Investment Management and Financial Markets

- Introduction to investment management principles and practices.
- Understanding investment management roles in financial decisions.
- Exploring financial markets and investment opportunities.
- Reviewing global market structures and functions.
- Understanding equities, bonds, and alternative investments.
- Examining objectives, risk tolerance, and expected returns.
- Identifying factors affecting investment decisions.

Unit 2: Investment Analysis and Evaluation Techniques

- Understanding investment analysis fundamentals.
- Applying financial statement analysis techniques.
- Reviewing valuation methods for investment decisions.
- Exploring equity analysis approaches.
- Understanding fixed income and bond analysis.
- Evaluating economic factors affecting investments.
- Analyzing industry trends and market opportunities.
- Comparing investment alternatives effectively.

Unit 3: Portfolio Construction and Asset Allocation Strategies

- Understanding portfolio management principles.
- Exploring portfolio theory and asset management.
- Developing asset allocation strategies.
- Applying diversification methods for risk reduction.
- Evaluating strategic and tactical allocation.
- Reviewing portfolio optimization techniques.
- Balancing investment risks and returns.
- Applying portfolio construction frameworks.

Unit 4: Investment Risk Management and Portfolio Performance Evaluation

- Understanding market, credit, and liquidity risks.
- Developing portfolio risk management approaches.
- Exploring investment risk measurement methods.
- Understanding performance evaluation techniques.
- Applying indicators for portfolio assessment.
- Reviewing risk-adjusted return measures.
- Monitoring portfolios under market changes.
- Developing strategies for portfolio stability.

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Unit 5: Advanced Portfolio Management Practices and Strategic Investment Planning

- Exploring advanced portfolio management strategies.
- Understanding behavioral finance impacts.
- Reviewing global investment trends.
- Developing long-term investment plans.
- Understanding ethical investment practices.
- Evaluating technology in asset management.
- Applying strategic investment frameworks.
- Improving portfolio review processes.

Final Insights & Key Takeaways

The course equips participants with essential knowledge to evaluate investments, construct effective portfolios, and manage financial risks professionally. Participants will develop a strategic understanding of investment analysis, asset allocation, and portfolio optimization practices to support informed long-term investment decisions.