MERCURY

# Strategic Investment Management: Real Estate and Private Equity

3 – 7 January 2027
Amman (Jordan)



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# Strategic Investment Management: Real Estate and Private Equity

**Ref:** 15301_288760 **Date:** 3 – 7 January 2027 **Location:** Amman (Jordan) **Fees:** 3300 Euro

## Introduction:

This strategic real estate and private equity investment management training aims to address the principles of practicing the latest real estate and private equity industry strategies. The program focuses on asset management, business strategy and development, and investment strategy and execution to optimize your strategic edge. You will analyze key industry trends and challenges and return to your firm, ready to evaluate and implement innovative investment approaches.

## Understanding Real Estate Private Equity:

Real estate private equity represents a substantial portion of the broader private equity market, wherein investors pool capital to invest in real estate assets. This course will delve into the real estate private equity model, providing participants with an in-depth understanding and guide to navigating this ambitious investment arena.

Through case studies and specialized training, this strategic real estate and private equity investment management course offers a unique opportunity to understand the theory and practice of real details of private equity investments.

## Targeted Groups:

- Individuals practicing in corporate finance, brokerage, and mergers and acquisitions.
- General managers and specialists.
- Chief investment officers.
- Directors of investments.
- Senior analysts.
- Research directors.
- Risk managers.
- Investment advisors.
- Capital managers.

## Course Objectives:

At the end of this strategic real estate and private equity investment management course, participants will be able to:

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- Gain strategic insights into all segments of the industry.
- Analyze complex challenges and potential solutions more effectively.
- Broaden your range of potential investment and allocation strategies.
- Extend your network by living and working with accomplished investment industry executives from various backgrounds and countries worldwide.
- Build relationships with diverse peers who can provide insights into your business challenges and career decisions.

## Targeted Competencies:

By the end of this strategic real estate and private equity investment management training, target competencies will be able to:

- Evaluate and implement innovative investment strategies across all industry segments.
- Invest decisions in a world of expected low returns.
- Understand the challenges of size for both asset allocators and asset managers.
- Understand strategic drivers of growth and profitability.
- Know the new approaches to investment policy design and execution.
- Organization of institutional investors.
- Learn about drivers of success for activism as an investment strategy.
- Co-investments in private markets.
- Know the disruptive innovations in the investment management industry.
- Search for alpha in today's environment.
- Implications of the growth in index investing for markets and the general investment management industry.
- Rise of smart beta investing and its implications.
- Fintech as a disruptive industry force and strategic responses from incumbents.
- Explore the future of hedge funds and private equity.
- Understand innovative fee structures for institutional investors.
- Trade execution in a world of high-frequency trading and multiple execution venues.
- Liquidity management in uncertain times.
- Valuate and M&A of investment management firms.

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# Course Content:

## Unit 1: Capital Management:

- Small company growth equity investing.
- Explore private equity and distressed investing.
- Learn about value creation, destruction, and capital markets.
- Manage investing capacity constraints to grow assets.
- Identify and manage talent for investing success.
- Underrepresented minorities among investment professionals.
- Asset liability management.

## Unit 2: Finding Value: Paradigm Capital:

- Modern value investing: The role of specialization in deal sourcing characteristics of attractive targets evaluation of deal flow investing and divesting.
- Hybrid investing.
- Invest and manage challenges of very large pools of capital.
- Invest strategies in a world of low interest rates and expected returns.
- Smart beta investing.
- Understand the challenges of spinning off an internal investment management operation into a successful firm.

## Unit 3: Frontier Markets Investing:

- Differentiated drivers, return, and risk in frontier and emerging markets versus developed markets.
- Develop an investing edge in emerging and frontier markets.
- Know the portfolio positioning to navigate political and regulatory uncertainty.
- Optimal fund structure.

## Unit 4: Real Assets:

- Learn about the role of real assets in an investment portfolio.
- Change the covariance of real assets with inflation and other asset classes.
- Real assets as an alpha-versus-beta opportunity.

## Unit 5: Commodities Investing: General Endowment Management:

- Commodities as an asset class: Sources of short-term return and risk, and sources of long-term return and risk.
- Inflation and commodities.
- Explore commodities investing in today's markets: beyond futures.

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## Unit 6: Fund Dynamics and Derivatives:

- Drivers of risk and return in private credit investing.
- Identify, evaluate, and structure opportunities in private credit investing.
- Develop an edge in private credit: Structure, strategy, and management of private credit funds.
- Learn about future risk and return in the major asset classes.
- Policy portfolio design.
- Understand risk management and liquidity management.
- Develop a successful investment organization.