Asset & Investment Management

18 - 22 Jan 2027
Casablanca (Morocco)

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Ref.: 16404_1019271 **Date:** 18 - 22 Jan 2027 **Location:** Casablanca (Morocco) **Fees:** 4500 **Euro**

Introduction:

The Asset and Investment Management course provides in-depth knowledge of modern investment principles, asset allocation, and portfolio optimization strategies. The course introduces learners to the key concepts of financial instruments, risk assessment, and performance evaluation used by global investment professionals. Participants will explore the dynamics of financial markets, institutional investment processes, and strategic decision-making in asset management.

Through a structured theoretical framework, the Asset and Investment Management program emphasizes value creation, sustainable growth, and capital efficiency. It also integrates analytical tools and data-driven insights essential for making informed investment decisions. Participants will have a comprehensive understanding of managing diversified investment portfolios within varying market conditions.

Targeted Groups:

This Asset and Investment Management training targets professionals seeking specialized knowledge and skills:

- Financial analysts and investment advisors.
- Portfolio and asset managers.
- Bankers and financial consultants.
- Wealth management professionals.
- Corporate finance officers.
- Risk management specialists.
- Institutional investors and fund administrators.
- Professionals transitioning into investment and asset management roles.
- Graduate students in finance, economics, and business management.

Course Objectives:

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

- Understand the principles of asset valuation and portfolio diversification.
- Analyze financial markets and investment instruments effectively.
- Apply strategic asset allocation techniques in various market environments.
- Evaluate investment risks and returns using quantitative and qualitative methods.
- Interpret economic indicators influencing portfolio performance.
- Develop structured investment policies aligned with organizational goals.
- Construct and manage balanced portfolios for optimal performance.
- Assess global investment opportunities and market trends.
- Communicate investment recommendations with clarity and evidence.
- Integrate ethical and sustainable practices into asset management decisions.

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Targeted Competencies:

Participants will gain the following competencies during the Asset and Investment Management program:

- Analytical skills in financial data interpretation.
- Decision-making ability in dynamic investment environments.
- Competence in portfolio construction and risk management.
- Understanding of capital markets and global investment systems.
- Capability to assess financial instruments and performance metrics.
- Proficiency in asset allocation strategies.
- Strategic planning and investment forecasting.
- Ethical judgment in investment decision-making.
- Effective communication of financial insights and reports.

Studying Scenarios:

In this Asset and Investment Management training, participants will develop their skills through the analysis of the following scenarios:

- Evaluating market fluctuations affecting investment portfolios.
- Designing asset allocation strategies for institutional clients.
- Managing multi-asset portfolios during economic downturns.
- Assessing the impact of interest rate changes on asset valuation.
- Comparing investment options for long-term capital growth.
- Interpreting risk-return profiles for different asset classes.
- Applying performance measurement techniques in real-time analysis.
- Formulating strategic investment reports based on market insights.

Course Content:

Unit 1: Foundations of Asset & Investment Management:

- Overview of global investment markets and financial systems.
- Principles of asset management and investor objectives.
- Types of financial assets: equities, bonds, derivatives, and alternatives.
- Understanding risk, return, and market efficiency.
- Role of asset managers and institutional investors.
- Key performance indicators and benchmarks in investment management.
- Introduction to Portfolio Theory and Diversification Benefits.
- Ethical and regulatory frameworks in asset management.

Unit 2: Portfolio Construction & Optimization:

- Defining investment policy statements and client objectives.
- Risk profiling and investor behavior analysis.
- Strategic and tactical asset allocation models.
- Portfolio optimization using quantitative methods.
- Correlation, covariance, and diversification strategies.
- Rebalancing techniques and performance tracking.

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- Integrating environmental, social, and governance ESG principles.
- Case study: Constructing a diversified portfolio in volatile markets.

Unit 3: Financial Instruments and Valuation Techniques:

- Equity valuation models: DDM, P/E ratio, and free cash flow.
- Fixed-income securities: pricing, duration, and yield curves.
- Derivatives and Their Role in Hedging and Speculation.
- Real estate and alternative investment valuation.
- Exchange-traded funds ETFs and mutual fund analysis.
- Credit analysis and rating methodologies.
- Practical valuation exercises using real market data.
- Application of discounted cash flow DCF in investment decision-making.

Unit 4: Risk Management and Performance Evaluation:

- Identifying market, credit, liquidity, and operational risks.
- Quantitative risk assessment models and stress testing.
- Value-at-Risk VaR and scenario analysis applications.
- Hedging strategies with derivatives and financial instruments.
- Evaluating portfolio performance: Sharpe ratio, Treynor ratio, and alpha.
- Risk-adjusted return metrics for portfolio assessment.
- Performance attribution and benchmarking.
- Developing risk management frameworks for institutional portfolios.

Unit 5: Strategic Investment Management and Global Perspectives:

- Global investment trends and macroeconomic influences.
- Asset management in emerging and developed markets.
- Strategic investment decisions under uncertainty.
- Integrating sustainability and responsible investing principles.
- Alternative investments: hedge funds, private equity, and commodities.
- Technology and Digital Transformation in Asset Management.
- Behavioral finance and investor psychology.
- Case study: Global portfolio diversification and performance strategy.

Final Insights & Key Takeaways:

The Asset & Investment Management course provides participants with the analytical tools, frameworks, and confidence to make informed investment decisions in dynamic markets. Graduates will manage diverse portfolios strategically, balancing risk and return for long-term success.

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Registration form on the :
Asset & Investment Management

code: 16404 **From:** 18 - 22 Jan 2027 **Venue:** Casablanca (Morocco) **Fees:** 4500 **Euro**

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