Portfolio Management and Corporate Finance Principles

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Introduction:

The portfolio management and corporate finance principles training course aims to equip management executives with critical tools to avoid making decisions that could diminish value, with potentially catastrophic results for the company, its staff, and the broader economy.

The certified portfolio manager course integrates core aspects of financial markets and portfolio management.

Over five days, we will delve into the critical financial decisions senior management must make, focusing on financing methods, evaluating companies and projects, and distributing residual cash flows to stakeholders.

As part of our portfolio management program, the first two days are dedicated to an in-depth study of financial instruments and the principles of equity portfolio management.

Targeted Groups:

- Senior executives with a desire to competently engage in financial decision-making.
- Junior executives aim to broaden their financial knowledge for career advancement.
- Finance professionals.
- Corporate finance staff seeking portfolio management training.

Course Objectives:

By the completion of this financial markets and portfolio management course, participants will have the ability to:

- Introduction to the best portfolio management certification options for enhancing credibility and professional standing.
- Obtain a comprehensive knowledge of various financial instruments.
- Distinguish between active and passive portfolio management strategies.
- Navigate the complexities of securing both long-term and short-term finance.
- Implement sophisticated investment appraisal techniques.
- Balance the compensation requirements of all stakeholders.
- Opportunities for portfolio management certificate training course for continuous learning.
- Exploration of free and paid resources for masters in portfolio management fundamentals program.
- Becoming a certified portfolio manager via comprehensive portfolio coursework.

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Targeted Competencies:

At the end of this certified portfolio management and corporate finance course, the target competencies will be able to:

- Grasping operating, investing, and financing decisions.
- Management of working capital.
- Decision-making for capital investments.
- Calculation of capital costs.
- Formulation of dividend policies.
- Financial forecasting techniques.
- Mastery of equity valuation.
- Expertise in portfolio management.
- Insight into debt and equity securities.
- Understanding the IPO process.

Course Content:

Unit 1: Debt Securities and Equity Securities:

- Understanding different categories of debt and equity securities.
- Examining the risk-return profile of equity versus debt instruments.
- Bond pricing techniques and equity valuation methods.
- Fundamentals of passive portfolio management.
- Principles of active equity portfolio management.

Unit 2: Derivatives and Alternative Investments:

- Exploring the characteristics of derivatives contracts.
- Risk mitigation using futures and options.
- Gaining leverage through derivative contracts.
- Derivative pricing methods.
- The pros and cons of alternative investment options.

Unit 3: Short and Long-Term Financing:

- Capital strategies for company growth.
- Theories and empirical data on capital structure decisions.
- An in-depth look at the IPO process.
- Assessing the benefits and drawbacks of public listings.
- Weighing the advantages against the disadvantages of debt financing.

Unit 4: Investment Appraisal and Company Valuation:

- Unpacking the concept of the weighted average cost of capital WACC.
- Applying NPV, IRR, payback, and modified payback models.
- CFO perspectives on preferred investment appraisal methods.
- The application of real options in financial decisions.
- Valuation using the free cash flow method.

Unit 5: Dissipation of Residual Earnings:

- Decision-making processes concerning executive remuneration.
- The strategic use of share options in compensation packages.
- An exploration of dividend distribution decisions.
- Real-world application of dividend policies.
- Understanding mergers and acquisitions from a financial perspective.