Finance & Business Acumen · FB410

Investment Analysis & Portfolio Management

Kuala Lumpur · 8 - 12 Feb 2027

Date	Venue	Duration
8 - 12 Feb 2027	**Kuala Lumpur**	**1 Week**
Fee	Ref	Language
£5,000 GBP	**FB410**	**English**

Introduction

This comprehensive 5-day Knowledge-Sharing and Professional Learning Visit Program provides participants with the opportunity to explore best practices, exchange experiences, and gain insights into investment analysis and portfolio management approaches used across financial institutions and corporate environments. The program focuses on financial markets, asset classes, investment evaluation methodologies, portfolio construction, risk management, and performance assessment. Through expert-led discussions, case reviews, and experience-sharing sessions, participants will develop a broader understanding of investment decision-making processes and contemporary investment strategies.

Program Objectives

By the end of this program, participants will be able to:

- Explore key principles and practices of investment management.
- Exchange knowledge on various financial instruments and asset classes.
- Review commonly applied approaches for evaluating investment opportunities.
- Examine portfolio construction and diversification practices.
- Gain insights into modern portfolio management concepts and strategies.
- Discuss risk assessment and mitigation approaches used in investment environments.
- Understand methods for evaluating portfolio performance.
- Explore current trends and developments in global financial markets and investment strategies.

Target Audience

This program is designed for:

- Investment Analysts
- Financial Analysts
- Portfolio Managers
- Finance & Accounting Professionals
- Treasury Professionals
- Banking Professionals

- Corporate Finance Officers
- Risk Management Personnel
- Wealth Management Advisors
- Professionals interested in investment and portfolio management practices

Program Agenda

Day 1

Investment Management Practices & Financial Markets Overview

- Overview of Investment Management Frameworks
- Financial Markets and Their Role in Investment Activities
- Risk and Return Considerations in Investment Decisions
- Time Value of Money Concepts
- Economic Indicators and the Investment Environment
- Insights into Various Asset Classes:
    - Equities
    - Fixed Income Securities
    - Mutual Funds
    - ETFs
    - Commodities
    - Alternative Investments
- Understanding Investor Objectives and Constraints

Day 2

Investment Analysis Approaches and Evaluation Methods

- Fundamental Analysis Practices
- Financial Statement Review from an Investor Perspective
- Ratio Analysis and Valuation Considerations
- Macroeconomic and Industry Assessment Approaches
- Technical Analysis Concepts and Applications
- Market Trend Interpretation and Chart Analysis
- Experience Sharing on Valuation Methodologies:
    - Discounted Cash Flow (DCF)
    - Dividend Discount Model
    - Relative Valuation
- Investment Evaluation and Decision-Making Practices

Day 3

Portfolio Construction and Asset Allocation Strategies

- Portfolio Management Principles and Frameworks
- Modern Portfolio Theory and Practical Applications
- Diversification Approaches and Best Practices
- Asset Allocation Methodologies
- Strategic versus Tactical Allocation
- Portfolio Optimization Concepts

- Managing Equity and Fixed Income Portfolios
- International Diversification Practices
- Behavioral Finance and Investor Psychology

Day 4

Risk Management and Portfolio Performance Assessment

- Investment Risk Categories and Considerations
- Portfolio Risk Measurement Approaches
- Beta, Standard Deviation, and Volatility Applications
- Risk-Adjusted Performance Measures
- Portfolio Performance Assessment Practices
- Benchmarking Methodologies
- Stress Testing and Scenario Analysis
- Hedging Approaches and Overview of Derivatives
- Regulatory and Compliance Perspectives

Day 5

Emerging Investment Strategies and Experience-Sharing Sessions

- Active versus Passive Investment Approaches
- ESG and Sustainable Investing Practices
- Alternative Investments: Market Perspectives
- Portfolio Rebalancing Approaches
- Market Timing versus Long-Term Investment Strategies
- Global Investment Trends and Developments
- Investment Strategy Case Reviews
- Portfolio Simulation and Discussion Session
- Key Takeaways, Knowledge Exchange, and Closing Discussion

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