



PM01 – Portfolio Management: Designing an Equity Strategy

COURSE OVERVIEW

This course is designed to enable participants to acquire working skills to design appropriate equity strategies and construct a performance-enhanced client portfolio.

PERFORMANCE OBJECTIVES

Upon completion of this course, participants will be able to:

- Identify equity strategies that can be included in a client's portfolio
- Construct a practical and performance-enhanced client portfolio
- Assess risk management tools to better diversify client's risks

COURSE PROGRAMME

8.30 am – 9.00 am	Registration
9.00 am – 9.10 am	Welcome remarks and introduction to the course
	Session I:
9.10 am – 9.40 am	<ul style="list-style-type: none">• Overview of asset classes (debt, equity, cash etc.)• Equity asset classes
9.40 am – 10.00 am	Morning refreshments
10.00 am – 10.50 am	Case Study 1
10.50 am – 11.00 am	Break
	Session II:
11.00 am – 11.30 am	<ul style="list-style-type: none">• Create and manage equity asset classes• Equity portfolio construction• Take the total return approach: An appreciation for dividends
11.30 am – 12.20 pm	Case Study 2
	Session III:
12.20 pm – 12.50 pm	<ul style="list-style-type: none">• Dividends: Pros and cons – global approach• Categories and characteristics of asset classes• Investigating investing styles
12.50 pm – 2.00 pm	Lunch
2.00 pm – 2.50 pm	Case Study 3
	Session IV:
2.50 pm – 3.20 pm	<ul style="list-style-type: none">• Managing different asset classes (equity, debt etc.)• Use of leverage and arbitrage to enhance investment performance• Growth vs value approach

3.20 pm - 3.40 pm	Afternoon refreshments
3.40 pm - 4.30 pm	Case Study 4
4.30 pm - 5.00 pm	Q & A
5.00 pm - 5.30 pm	Debrief & Program Wrap-up