



PM02 - Portfolio Management: In Pursuit of Performance and Returns

COURSE OVERVIEW

This course is designed to enable participants to acquire working skills to design appropriate portfolio management strategies to suit client's needs.

PERFORMANCE OBJECTIVES

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

- Acquire working skills to better service institutional clients and meet their increasing sophisticated needs
- Assess risk management tools to better diversify client's risks
- Acquire and construct portfolio management strategies that can be used in constructing client's portfolio
- Design innovative risk management approaches to enhance returns
- Analyse and use risk models, and position solutions from the client's perspective

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">• Win new clients• Analyse investor's preferences
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">• Client account management strategies• Private wealth management strategies• Prepare investment portfolio policy (Investment Policy Statement)
11.30 am - 12.20 pm	Case Study 2
	Session III:
12.20 pm - 12.50 pm	<ul style="list-style-type: none">• Absolute vs total return approach issues• Risk reduction and return enhancement opportunities• Leveraging, margin, and credit risk management
12.50 pm - 2.00 pm	Lunch
2.00 pm - 2.50 pm	Case Study 3

Session IV:

2.50 pm - 3.20 pm

- Stock selection, asset allocation and style allocation
- Financial engineering through structured products and derivatives
- Measure and demonstrate performance

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