



Portfolio Management I - Online

This introduction to portfolio management theory lays out the different types of investor characteristics and their implications for portfolio construction. This course also teaches the basics of fixed income, equity and money market securities.

This is an asynchronous eLearning course that can be accessed 24/7 from any internet enabled computer. Subscription period for this course is 90 days.

Available Session(s):

Available Today

Online

USD \$349

Online

Instructor(s):[]

Targeted Audience

Junior portfolio managers, money managers, research analysts, client services staff, consultants, individual and institutional investors, private bankers and financial advisors, research staff members of pension boards and plan sponsors.

Advance Preparation

No advance preparation required.

Prerequisites

None

Learning Objectives

Students will be able to:

- Define portfolio management and the portfolio management process
- Identify institutional investors and their specific characteristics
- Identify different types of investment instruments used by institutional investors
- Apply the Five-Way Model to analyze and understand prospective clients and their needs
- Determine how much risk an individual can assume by examining portfolio goals
- Compare traits of individual and institutional investors
- Compare and contrast different types of money market funds, and discuss the specific advantages and disadvantages of each

- Calculate the bank discount basis and bond equivalent yields on a Treasury Bill
- Select the best investment vehicle to meet a hypothetical client's needs
- Describe the characteristics of long-term debt instruments
- Define key terms related to the bond market.
- Identify the major types of domestic and foreign bonds.
- Assess the utility of different debt instruments.
- Describe bond ratings.
- Explain how bond issuers enhance credit ratings. Define key terms used in the securities market.
- Compare and contrast two types of analysis. Identify factors affecting share price.
- Apply four basic measures to determine the accuracy of stock prices.
- Identify companies that are attractive investments.
- Define risk, and discuss the role it plays in portfolio management. Explain the relationship between
- Identify actions that can be taken to rebalance a portfolio. Use different methods to evaluate portfolio returns.
- Assess whether your client's overall investment objectives have been met.

Follow-Up Courses

Portfolio Management II - Online

Level: Basic

CPE Credits: 7

Instructional Method: Self-Study

Detailed Outline

The institutional investor

- The portfolio management process
- Types of institutional investors

The individual investor

- Five way model
- Risk and the individual investor: an examination of portfolio goals
- Individual vs. institutional investors

The money markets

- Different types of money market funds
- Advantages and disadvantages of different types of money market funds
- Government treasury bills including bank discount basis and bond equivalent yields
- Selecting investment vehicles based on the needs of a hypothetical client

The bond market

- Characteristics of long-term debt instruments
- Key terms related to the bond market
- Assessing the utility of different debt instruments

Equity securities

- Compare and contrast methods for valuing equities
- Dividends, earnings and assets
- Identifying attractive equities for investment

Portfolio theory: Risk and Return

- The role of risk in portfolio management
- Relationship between risk and return
- Risk measurement techniques

Portfolio theory: Portfolio Monitoring

- Alternative strategies
- Rebalancing a portfolio
- Methods for evaluating portfolio returns
- Assessing client satisfaction with risk/return balance

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