



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.

Please note that this is a curriculum of individual course modules. You will need to pass each module exam in order to qualify for a certificate of completion.

This is an asynchronous eLearning program that can be accessed 24/7 from any internet enabled computer.

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.

Alumni Comments

"The quality of the material was easy to follow and very helpful."

"THE COURSE CONTENT WAS QUITE CLEAR AND EASY TO UNDERSTAND."

"Great, feel like I am actually learning in a classroom"

"Overall, I am really pleased with the class."

Follow-Up Courses

Portfolio Management II - Online

Financial Planning - Online

Wealth Management - Online

Portfolio Management Program

Level: Basic

CPE Credits: 7

Instructional Method: Self-Study

Detailed Outline

The Institutional Investor

Topics covered include:

- . The portfolio management process
- . Types of institutional investors

Duration: 1 hour

The Individual Investor

Topics covered include:

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

Duration: 1 hour

Money Markets and Portfolio Management

Topics covered include:

- . Different types of money market funds
- . Advantages and disadvantages of different types of money market funds
- . Government treasury bills including bank

Managing Portfolios with Bonds

Topics covered include:

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

discount basis and bond equivalent yields
. Selecting investment vehicles based on the needs of a hypothetical client
Duration: 1 hour

instruments
Duration: 1 hour

Managing Portfolios with Equities

Topics covered include:

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

Duration: 1 hour

Portfolio Theory: Risk and Return

Topics covered include:

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

Duration: 1 hour

Portfolio Theory: Portfolio Monitoring

Topics covered include:

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

balance

Duration: 1 hour

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