Portfolio Theory: Portfolio Monitoring - Online

This introduction to portfolio management theory lays out the different types of investor characteristics and their implications for portfolio construction.
This course replicates the content from module 7 of Portfolio Management I - Online
This is an asynchronous eLearning course that can be accessed 24/7 from any internet enabled computer.

Available Session(s):

Available Today	Online	USD $60

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.

Learning Objectives

Students will be able to:
· 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

Level: Basic

CPE Credits: 1

Instructional Method: Self-Study

Detailed Outline

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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