



## Evaluating Portfolio Performance - Online

This course illustrates specific ways to analyze portfolios, including the Sharpe Ratio and performance attribution analysis.

This course replicates the content from lesson 8 of Portfolio Management II - Online

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 \$60.00

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:

- Explain the importance of risk adjustment when comparing one portfolio to another
- Distinguish between Sharpe's ratio and Treynor's ratio
- Discuss performance attribution analysis
- Recognize the significance of Global Investment Performance Standards (GIPS)

**Level:** Intermediate

**CPE Credits:** 1

**Instructional Method:** Self-Study

## **Detailed Outline**

### **Evaluating Portfolio Performance**

- Risk-adjusted measures
- Performance attribution analysis
- International performance standards

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