

Course Name

Portfolio Management and Corporate Finance Principles

Sector Name

Finance, Accounting and Banking

Document Type

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Portfolio Management and Corporate Finance Principles

Course Introduction

Organizations continuously make financial decisions about where to invest, how to fund initiatives, and how to balance risk and return across multiple projects and assets. Weak integration between portfolio management and corporate finance principles often leads to suboptimal capital allocation and misaligned strategic priorities.

Developed by **Boost**, this course provides a structured and practical understanding of how portfolio management decisions are supported by core corporate finance principles. Participants learn how investment portfolios are evaluated, prioritized, and funded, while ensuring alignment with organizational value creation and financial sustainability.

Boost's Portfolio Management and Corporate Finance Principles - Intermediate course equips professionals to make informed, value-driven financial decisions across portfolios of investments and initiatives.

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Target Audience

- ✓ Finance and corporate strategy professionals
- ✓ Investment and portfolio management staff
- ✓ Business development and planning teams
- ✓ Project and program managers involved in capital decisions
- ✓ Senior analysts supporting financial decision-making

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Learning Objectives

- ✓ Understand the role of portfolio management in corporate decision-making
- ✓ Apply core corporate finance principles to investment evaluation
- ✓ Analyze risk and return across multiple investments
- ✓ Support capital allocation and prioritization decisions
- ✓ Understand funding structures and financial trade-offs
- ✓ Align portfolio decisions with organizational strategy and value

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Course Outline

✓ DAY 01

Foundations of Portfolio Management and Corporate Finance

Module 1: Understanding Portfolio Management

- ✓ What portfolio management means in a corporate context
- ✓ Portfolio vs. individual investment decisions
- ✓ Strategic role of portfolio thinking

Module 2: Core Corporate Finance Principles

- ✓ Value creation and financial objectives
- ✓ Risk, return, and time value of money (conceptual)
- ✓ Financial discipline in investment decisions

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✓ Day 02

Investment Evaluation and Prioritization

Module 3: Evaluating Investment Opportunities

- ✓ Economic logic behind investment decisions
- ✓ Cash flow perspective and value drivers
- ✓ Qualitative and quantitative evaluation considerations

Module 4: Portfolio Prioritization and Trade-Offs

- ✓ Resource constraints and opportunity cost
- ✓ Balancing short-term and long-term value
- ✓ Managing competing investment demands

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Course Outline

✓ Day 03

Risk, Return, and Portfolio Balance

Module 5: Risk and Return in Portfolio Context

- ✓ Types of financial and business risk
- ✓ Diversification principles
- ✓ Risk-adjusted thinking

Module 6: Portfolio Balance and Optimization

- ✓ Balancing growth, stability, and liquidity
- ✓ Managing concentration risk
- ✓ Portfolio review and rebalancing logic

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Course Outline

✓ Day 04

Financing Decisions and Capital Structure

Module 7: Financing Investment Portfolios

- ✓ Internal vs. external financing
- ✓ Equity, debt, and hybrid options
- ✓ Cost of capital considerations

Module 8: Capital Structure and Financial Flexibility

- ✓ Impact of financing choices on risk and performance
- ✓ Financial leverage implications
- ✓ Maintaining financial resilience

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Course Outline

✓ Day 05

Integration, Governance, and Strategic Alignment

Module 9: Portfolio Governance and Financial Control

- ✓ Decision rights and approval structures
- ✓ Monitoring portfolio performance
- ✓ Managing deviations and underperformance

Module 10: Aligning Portfolio Decisions with Strategy

- ✓ Linking investment portfolios to strategic goals
- ✓ Supporting sustainable value creation
- ✓ Continuous improvement in portfolio decisions

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
March 15, 2027	March 19, 2027	5 days	4950.00 \$	Spain , Madrid
July 19, 2027	July 23, 2027	5 days	4250.00 \$	UAE , Abu Dhabi
Dec. 14, 2026	Dec. 18, 2026	5 days	4250.00 \$	UAE , Dubai
April 19, 2027	April 23, 2027	5 days	4250.00 \$	UAE , Abu Dhabi

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