



Consulting and Training | Reach New Heights

Course Name

Fundamentals of Investment Management

Sector Name

Finance, Accounting and Banking

Document Type

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Fundamentals of Investment Management

Course Introduction

Fundamentals of Investment Management

Great investor Warren Buffet confirmed that “It’s far better to buy a wonderful company at a fair price, than a fair company at a wonderful price”... But how can you have sufficient ability to analyze your target markets and adequate knowledge that allows you to have the right vision that brings the highest possible return on investment?

The training program is implemented by combining the participants' academic knowledge and practical practice **(30% theoretical / 70% practical activities)**.

At the end of the training program, Participants will be involved in a practical workshop to show their skills in applying what they were trained for.

A detailed report is submitted to each participant and the training department in your organization on the results of the participant's performance and the return on training.

This program focuses on exercises, case studies, and workshops.

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Fundamentals of Investment Management

Target Audience

- ✓ Finance Professionals – Enhancing investment and portfolio management skills.
- ✓ Wealth & Asset Managers – Managing client investments and risk.
- ✓ Corporate Finance Teams – Overseeing business investments and capital allocation.
- ✓ Retail & Institutional Investors – Understanding markets and investment strategies.
- ✓ Students & Analysts – Preparing for careers in finance and investment.

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Fundamentals of Investment Management

Learning Objectives

- ✓ Identify the most prominent concepts of the investment world.
- ✓ Understand how stock markets and investment companies work.
- ✓ Identify several types of investment.
- ✓ Understand the elements and principles of successful investment.
- ✓ Identify stages of the successful investment management process.
- ✓ Understand how to create and manage a strong investment portfolio.
- ✓ Master defining and analysing investment risks.
- ✓ Master professional investor skills.
- ✓ Explore investment talent inside your employees through practical application.

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Fundamentals of Investment Management

Course Outline

✓ **01 DAY ONE**

Introduction to the Investment World:

- ✓ Why should you invest? "The benefits of investing in the development of organizational growth"
- ✓ Key concepts and definitions used in the investment world
- ✓ Who are the major players in the investment world?
- ✓ How does the stock market work?
- ✓ How do investment banks and companies work?
- ✓ Investment products.

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Course Outline

✓ 02 DAY TWO

Types of investment funds:

- ✓ Pension Funds
- ✓ Sovereign Wealth Funds
- ✓ Open-Ended/Mutual Funds
- ✓ Real Estate Investment Trusts
- ✓ Market Exchange-Traded Funds
- ✓ Hedge Funds
- ✓ Private Equity

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Course Outline

✓ 03 DAY THREE

Types of Investment strategies (Aggressive, Balanced, and Conservative).

- ✓ Active vs. passive investment management.
- ✓ Stages of Investment Management Process.
- ✓ Defining Investment Objectives.
- ✓ Develop asset allocation.

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Course Outline

✓ 04 DAY FOUR

Portfolio management fundamentals

- ✓ Risk analysis tools and strategies.
- ✓ Reduce Risks.
- ✓ Measuring Portfolio Return.

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Course Outline

✓ **05 DAY FIVE**

ROI Measuring Strategies.

- ✓ Tips and tricks of successful investment management.
- ✓ Successful investor skills.
- ✓ Workshop.

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
Dec. 14, 2026	Dec. 18, 2026	5 days	5950.00 \$	USA , Texas
May 2, 2027	May 6, 2027	5 days	4250.00 \$	KSA , Riyadh
Aug. 2, 2027	Aug. 6, 2027	5 days	4250.00 \$	UAE , Abu Dhabi
Jan. 11, 2027	Jan. 15, 2027	5 days	4250.00 \$	UAE , Dubai

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