MANAGING EQUITY PORTFOLIOS



GENTEX®
TRAINING CENTER

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Introduction

Managing Equity Portfolios Training Course builds the analytical and portfolio skills that equity managers, analysts and advisers need to run equity mandates. Participants learn how to build an investment case, construct a portfolio from selected holdings and control the risks that equity markets create. The programme covers equity valuation, factor exposure, sector allocation, active risk, position sizing, rebalancing and attribution. Furthermore, it addresses benchmark selection, style analysis, governance and reporting to clients and committees. As a result, delegates can manage an equity portfolio with a repeatable process and defensible evidence. Gentex Training Center delivers the programme through modelling workshops and portfolio review case work.

Managing Equity Portfolios Course Objectives

- Explain equity market structure, benchmarks and index construction.
- Apply fundamental and relative valuation to listed equities.
- Build an investment case with clear thesis, catalysts and risks.
- Construct equity portfolios using sector, factor and style allocation.
- Apply position sizing, concentration limits and portfolio constraints.
- Measure active risk, tracking error and factor exposures.
- Evaluate performance using Sharpe ratio, information ratio and alpha.
- Perform attribution by sector, country, factor and security selection.
- Manage rebalancing, trading cost and implementation decisions.
- Report portfolio performance, risk and positioning to clients and committees.

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Course Methodology

The course combines market briefings with hands-on modelling workshops and portfolio review case studies. Participants value a set of equities, construct a portfolio in Excel and run attribution analysis. In addition, structured peer review and group discussion reinforce each technique, and every day closes with an applied equity portfolio task.

Who Should Take This Course

- Equity portfolio managers, analysts and research staff.
- Wealth management and private banking investment professionals.
- Pension, endowment and sovereign fund investment teams.
- Fund selectors and manager research analysts.
- Treasury and proprietary investment staff.
- Consultants and advisers supporting equity mandates.

Managing Equity Portfolios Course Outlines

Day 1: Equity Markets, Benchmarks and Investment Process

- Equity market structure, participants and trading venues.
- Index construction, weighting methodologies and benchmark selection.
- Investment philosophy, process and portfolio mandate design.
- Investment policy statements and constraint definition.
- Research process, idea generation and screening.
- Governance of equity mandates and committee oversight.

- Workshop: selecting a benchmark and defining portfolio constraints.

Day 2: Equity Valuation and Investment Case Building

- Fundamental analysis and drivers of shareholder value.
- Valuation metrics: price-earnings, EV/EBITDA, price-book and dividend yield.
- Discounted cash flow valuation and cost of equity estimation.
- Relative valuation and peer group benchmarking.
- Quality, growth and value characteristics as selection criteria.
- Building a thesis with catalysts, risks and sell discipline.
- Workshop: valuing a listed company and drafting an investment case.

Day 3: Portfolio Construction and Risk Control

- Sector, country and factor allocation decisions.
- Style tilts: value, growth, quality, momentum and size.
- Position sizing, weighting schemes and concentration limits.
- Active risk, tracking error and risk budgeting.
- Correlation, diversification and drawdown management.
- Liquidity, capacity and trading constraints.
- Workshop: constructing an equity portfolio with risk limits.

Day 4: Performance Measurement and Attribution

- Benchmark-relative performance and active return analysis.
- Risk-adjusted metrics: Sharpe ratio, information ratio and alpha.
- Attribution by sector, country, factor and stock selection.
- Brinson attribution and timing versus selection effects.

- Style analysis and factor exposure reporting.
- Performance net of fees and transaction costs.
- Workshop: running attribution and style analysis on an equity portfolio.

Day 5: Rebalancing, Reporting and Client Communication

- Rebalancing triggers, drift bands and tax considerations.
- Trading implementation, execution cost and market impact.
- Reporting packs, factsheets and portfolio commentary.
- Handling underperformance and mandate breaches.
- Client meetings, expectation setting and behavioural risk.
- Presenting to investment committees and trustees.
- Workshop: presenting an equity portfolio review before a review panel.

Conclusion

By successfully completing Managing Equity Portfolios Training Course, participants will have acquired the knowledge to run equity mandates with a disciplined, evidence-based process. They will understand equity valuation, portfolio construction, active risk control, attribution and reporting, and they will know how to explain portfolio positioning and performance clearly. As a result, delegates improve portfolio outcomes and client confidence. Gentex Training Center builds the programme around current equity investment practice.

FAQs for the Managing Equity Portfolios course

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Q1 What is the "Managing Equity Portfolios" course about?

It covers how equity portfolios are built, risk-controlled and measured. You learn equity valuation, investment case building, sector and factor allocation, position sizing, active risk control, performance attribution and client reporting, with practical Excel modelling.

Q2 What are the key benefits of the "Managing Equity Portfolios" course?

You gain a repeatable process for selecting stocks and constructing portfolios instead of relying on individual calls. You also improve risk control, measure performance more objectively, strengthen client reporting, and manage rebalancing and trading costs more deliberately.

Q3 What skills will I gain from the "Managing Equity Portfolios" course?

You will gain equity valuation and investment case building, equity portfolio construction and risk control, equity performance measurement and attribution, and rebalancing, reporting and client communication.

Q4 What tools, methods, or standards are covered in the "Managing Equity Portfolios" course?

The course covers price-earnings, EV/EBITDA, price-book and dividend yield valuation metrics, discounted cash flow valuation and cost of equity estimation, factor and style analysis including value, growth and momentum, active risk and tracking error budgeting, position sizing and concentration limits, Sharpe ratio, information ratio and alpha, Brinson attribution, rebalancing bands and trading cost analysis.

Q5 How is the "Managing Equity Portfolios" course applied in real-world practice?

Graduates apply it to value and screen listed equities, write investment cases with clear risks, construct and rebalance portfolios within mandate limits, monitor active risk and factor exposures, run attribution and style analysis, prepare factsheets and commentary, and present portfolio reviews to clients and investment committees.