PROFESSIONAL CERTIFICATE IN STRATEGIC INVESTMENT MANAGEMENT



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TRAINING CENTER

GENTEX Training Center LLC | Orlando - FL, USA
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Introduction

Professional Certificate in Strategic Investment Management Training Course develops the judgement that investment professionals need to build and steer portfolios through changing markets. Participants learn how to set investment policy, allocate across asset classes, construct portfolios and measure performance against objectives. The programme covers asset allocation, portfolio theory, equity and fixed income selection, alternative assets, risk management and investment governance. Furthermore, it addresses behavioural bias, manager oversight and reporting to investment committees. As a result, delegates can turn an investment policy into a portfolio that meets its mandate. Gentex Training Center delivers the programme through modelling workshops and portfolio case work.

Professional Certificate in Strategic Investment Management Course Objectives

- Set investment policy statements with clear objectives and constraints.
- Apply strategic and tactical asset allocation across asset classes.
- Construct portfolios using mean-variance optimisation and risk budgeting.
- Apply the capital asset pricing model and factor-based approaches.
- Evaluate equity, fixed income and alternative asset investments.
- Measure and attribute portfolio performance against benchmarks.
- Apply risk measures including volatility, beta, tracking error and drawdown.
- Assess behavioural biases that distort investment decisions.
- Apply rebalancing, monitoring and manager oversight disciplines.
- Report portfolio strategy, risk and performance to committees.

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Course Methodology

The course combines technical briefings with portfolio modelling workshops and case studies. Participants build an asset allocation model, construct a portfolio and prepare an investment committee report. In addition, structured peer debate sharpens judgement, and each day closes with an applied portfolio task.

Who Should Take This Course

- Investment managers, analysts and portfolio specialists.
- Pension, endowment and sovereign fund investment staff.
- Private bankers and wealth management professionals.
- Treasury and corporate investment officers.
- Consultants, actuaries and advisers supporting investment decisions.
- Compliance and risk staff overseeing investment mandates.

Professional Certificate in Strategic Investment Management Course Outlines

Day 1: Investment Policy and Asset Allocation

- Investment policy statement: objectives, constraints and time horizon.
- Risk and return fundamentals for asset classes.
- Strategic asset allocation and long-term return assumptions.
- Tactical asset allocation and market timing discipline.
- Correlation, diversification and portfolio risk contribution.
- Rebalancing policy and tolerance bands.

- Workshop: drafting an investment policy statement for a client mandate.

Day 2: Portfolio Theory and Construction

- Modern portfolio theory and the efficient frontier.
- Mean-variance optimisation and its practical limits.
- Capital asset pricing model, beta and required return.
- Factor investing, smart beta and style analysis.
- Risk budgeting and position sizing.
- Constraints, liquidity and implementation costs.
- Workshop: building an optimised multi-asset portfolio.

Day 3: Asset Class Analysis and Selection

- Equity valuation: dividends, multiples and discounted cash flow.
- Fixed income: duration, credit spread and yield curve positioning.
- Real assets, commodities, private markets and hedge funds.
- Currency exposure and hedging decisions.
- Sustainable and ESG investment considerations.
- Fund and manager selection with fee analysis.
- Workshop: evaluating securities and funds for portfolio inclusion.

Day 4: Risk Management and Performance Measurement

- Volatility, beta, tracking error and value at risk.
- Stress testing, scenario analysis and drawdown control.
- Performance measurement: time-weighted and money-weighted returns.

- Attribution analysis and benchmark selection.
- Behavioural biases: loss aversion, anchoring and herd behaviour.
- Monitoring, reporting and investment committee review.
- Workshop: running attribution and risk analysis on a model portfolio.

Day 5: Investment Governance and Committee Reporting

- Governance structures, mandates and delegation limits.
- Fiduciary duties and conflict of interest management.
- Investment policy review cycles and mandate changes.
- Monitoring managers, fees and mandate compliance.
- Building investment committee papers and dashboards.
- Presenting portfolio strategy and risk under challenge.
- Workshop: presenting an investment strategy review to a committee.

Conclusion

By successfully completing Professional Certificate in Strategic Investment Management Training Course, participants will have acquired the knowledge to set investment policy, construct portfolios and steer them with discipline. They will understand asset allocation, portfolio theory, asset class selection, risk measurement, performance attribution and investment governance, and they will know how to report strategy and risk with evidence. As a result, delegates manage portfolios that stay aligned to mandate. Gentex Training Center builds the programme around current investment practice.

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FAQs for the Professional Certificate in Strategic Investment Management course

Q1 What is the "Professional Certificate in Strategic Investment Management" course about?

It covers how portfolios are built and managed against a mandate. You learn investment policy setting, asset allocation, portfolio construction and optimisation, asset class selection, risk management and performance attribution, and investment governance and committee reporting.

Q2 What are the key benefits of the "Professional Certificate in Strategic Investment Management" course?

You gain a disciplined investment process rather than isolated stock or fund picks. You also improve allocation decisions and risk budgeting, measure and attribute performance properly, control drawdown and behavioural bias, and present strategy and risk in a form committees can act on.

Q3 What skills will I gain from the "Professional Certificate in Strategic Investment Management" course?

You will gain investment policy and asset allocation strategy, portfolio construction and optimisation, investment risk measurement and performance attribution, and investment governance and committee reporting.

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Q4 What tools, methods, or standards are covered in the "Professional Certificate in Strategic Investment Management" course?

The course covers investment policy statements, strategic and tactical asset allocation, modern portfolio theory and efficient frontier analysis, mean-variance optimisation, the capital asset pricing model, factor and style analysis, risk budgeting, discounted cash flow and multiples equity valuation, duration and credit spread analysis, sustainability and ESG considerations, volatility, beta, tracking error and value at risk, stress and scenario testing, time-weighted and money-weighted returns, attribution analysis and investment committee reporting.

Q5 How is the "Professional Certificate in Strategic Investment Management" course applied in real-world practice?

Graduates apply it to write and review investment policy statements, set asset allocation and rebalancing bands, construct and monitor portfolios, select funds and managers, run attribution and risk analysis, address behavioural bias in decisions, and prepare investment committee papers and dashboards.