

Investments & Portfolio Management Training

COURSE CONTENT

GET IN TOUCH



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About Multisoft

Train yourself with the best and develop valuable in-demand skills with Multisoft Systems. A leading certification training provider, Multisoft collaborates with top technologies to bring world-class one-on-one and certification trainings. With the goal to empower professionals and business across the globe, we offer more than 1500 training courses, which are delivered by Multisoft's global subject matter experts. We offer tailored corporate training; project Based Training, comprehensive learning solution with lifetime e-learning access, after training support and globally recognized training certificates.

About Course

The Investments & Portfolio Management Training by Multisoft Systems is a comprehensive program designed to equip finance professionals, analysts, and aspiring investors with in-depth knowledge of managing financial assets and making informed investment decisions. This course covers essential concepts such as asset allocation, portfolio construction, risk-return trade-offs, market analysis, and performance evaluation using real-world scenarios and tools.

Module 1: Introduction to investment

- ✓ What is investment?
- ✓ Types of investments/ vehicles: equities, bonds, funds, ETFs, REITs
- ✓ Risk vs. return trade-off
- ✓ Time value of money, compounding

Module 2: Equity Analysis

- ✓ Fundamental analysis: Earnings, P/E, PEG, ROE, etc.
- ✓ Technical analysis: Trends, charts, volume, moving averages
- ✓ Understanding market cycles and investor sentiment

Module 3: Fixed Income & Debt Instruments

- ✓ Types of bonds: government, municipal, corporate, zero-coupon
- ✓ Yield curves, interest rate risk, and duration
- ✓ Credit ratings and default risk
- ✓ Bond pricing and the relationship with interest rates

Module 4: Mutual Funds, ETFs, and Index Investing

- ✓ Active vs. passive investing
- ✓ Fund structure, fees, and performance evaluation

Module 5: Risk Management & Behavioral Biases

- ✓ Types of risk: systematic, unsystematic, liquidity, currency, geopolitical
- ✓ Volatility measures: standard deviation, beta, VaR (Value at Risk)
- ✓ Behavioral biases: overconfidence, loss aversion, herding, anchoring

Module 6: Tax-Efficient Investing & Accounts

- ✓ Capital gains tax, tax-loss harvesting

- ✓ Tax-deferred vs. taxable accounts
- ✓ Asset location strategy
- ✓ Tax-efficient fund selection

Module 7: Portfolio Construction

- ✓ Asset allocation
- ✓ Risk management
- ✓ Diversification

Module 8: Analysis of stocks and bonds

- ✓ Fundamental
- ✓ Technical analysis

Module 9: Risk Management

- ✓ Hedging
- ✓ Diversification
- ✓ Asset allocation strategies.

Module 10: Performance Evaluation

- ✓ Portfolio performance measurement
- ✓ Attribution analysis

Module 11: Behavioral Finance

- ✓ Psychological biases and their impact on investment decisions