UNDERSTANDING PORTFOLIO MANAGEMENT BLENDED COURSE

DATE	**December 14 – 15, 2026**
TIME	**9.00am – 3.00pm Daily**
COST	**N295,500.00 online & N350,500.00 onsite per participant (Excl. of all Taxes)**
VENUE	**Blended Class**

Workshop overview:

This course provides a detailed and basic understanding of portfolio management by introducing relevant concepts that build the necessary foundations. At the end of the program delegates will have a thorough understanding of:

- The importance of Portfolio Management
- The building blocks to creating a portfolio.
- Why the Investment Policy Statement is an essential element to portfolio creation.
- The key concepts to portfolio creation
- How client mandates are formed
- How performance is measured for portfolio managers
- The various clients that portfolios are created for.

The following delegates will find the workshop beneficial:

Junior-Middel office Portfolio Managers	*Investment Managers*
Regulators	*Wealth/Business Development Managers*
Credit/Risk Managers	*Person with a solid finance background looking to transition into a Portfolio management role*
Compliance Officers/FinCon Team Members	*Internal Control/Audit team members*

<u>COURSE OUTLINE</u>

1. Why Portfolio Management

i. What is Portfolio Management

ii. The Portfolio Perspective - Diversification & Risk Reduction

iii. Avoiding Disasters and Downside Protection

iv. Not Necessarily Downside Protection

v. Composition and Component Matters

2. Steps in the Portfolio Management Process

i. The Planning Step

ii. The Execution / Construction Step

iii. The Feedback Step

3. Portfolio Planning

i. Investment Policy Statement (IPS) and Its Components

ii. The Investment Objectives

iii. The Investment Constraints

iv. Gathering Client Information

4. Portfolio Construction

i. Asset Classes

ii. Capital Market Expectations

iii. Extra: Economics and Investment Markets

iv. Strategic Asset
Allocation:

a) Investment Characteristic of Assets - Risk and Return

b) Efficient Frontier (Mean Variance Optimization)

c) Utility Theory

5. Portfolio Performance

i. Time Weighted Return

ii. Historical Return vs Expected Return

iii. Risk and Return Trade-off

iv. Understanding Benchmarks

v. Performance Evaluation

a) Performance Measurement

b) Performance Attribution

c) Performance Appraisal

6. Investment Clients

i. Individuals - Private Wealth Management

ii. Institutions

a) Defined Benefit Pension Plans

b) Endowments & Foundations

c) Banks

d) Insurance Companies

e) Sovereign Wealth Funds

f) Investment Companies

The faculty is drawn from our pool of facilitators (click here for full details)

Kindly forward your nomination(s) to mmanhq@fmda.com.ng and payment can be made to the following account before the commencement date of training:

Account Name:	Financial Markets Dealers Association
Bank:	GTBank
Account Number:	0001272210
Branch:	Adeola Odeku, Victoria Island, Lagos.
Sort Code:	058152010.

For further information/Registration, please call Chris on 08023548999 or 08079779911.

Thank you.