



Investment Principles and Portfolio Decisions Training Course

18 – 22 January 2027
San Diego



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Ref: 416_133767 **Date:** 18 – 22 January 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Investment Principles and Portfolio Decisions Training Course is a five-day foundation course for finance, treasury, investment-support, and relationship professionals who leave with an Investment Principles Decision Workbook. The course connects investment objectives, market structure, time value of money, risk and return, asset classes, securities analysis, valuation basics, diversification, portfolio construction, and performance review. Agile Leaders Training Center delivers this course on investment principles and portfolio decisions.

Who Should Attend

- Finance functions responsible for supporting investment analysis and decision records
- Treasury functions responsible for liquidity investments and risk-return comparisons
- Investment-support functions responsible for data, instruments, reports, and portfolio administration
- Relationship functions responsible for discussing objectives, constraints, and investment choices
- Corporate planning functions responsible for evaluating financial alternatives and capital allocation evidence
- Professionals moving into investment, asset-management, or portfolio-support roles

The course assumes participants use basic financial information at work and leaves out advanced derivatives pricing, regulated advice, trading execution, and professional examination preparation.

Departments and Industries

The course supports foundation investment decisions across financial, corporate, institutional, and advisory settings.

- Finance, treasury, investment, and corporate-planning departments
- Asset-management, wealth-support, and investment-operations teams
- Banking, insurance, pensions, and professional-services organizations
- Technology, telecommunications, manufacturing, and energy organizations
- Healthcare, education, nonprofit, and public institutions
- Family-office, endowment, and foundation support functions

Learning Objectives

By the end of this course, participants will be able to:



- Apply investment objectives and constraints to a decision brief
- Use time-value calculations to compare financial choices
- Compare equity, debt, pooled, and alternative investment instruments
- Analyze basic security value, return, and risk evidence
- Build a diversified portfolio allocation using correlation and risk profiles
- Evaluate portfolio performance against objectives and a suitable benchmark

Course Agenda

Day 1: Investment Context and Objectives

- Investment Industry Participant and Function Map
- Primary and Secondary Market Process Diagram
- Investor Objective and Constraint Statement
- Risk Tolerance and Capacity Profile
- Investment Decision Governance Checklist

Day 2: Time Value, Return and Risk

- Present and Future Value Calculation Sheet
- Net Present Value Comparison Method
- Holding-Period and Annualized Return Measures
- Dispersion and Volatility Diagnostic
- Risk-Return Tradeoff Decision Grid

Day 3: Instruments and Valuation Basics

- Equity Security Characteristics Matrix
- Debt Security Cash Flow and Yield Map
- Pooled Investment Vehicle Comparison
- Alternative Asset Role Assessment
- Basic Security Valuation Assumption Sheet

Day 4: Diversification and Portfolio Construction

- Asset Class Risk-Return Profile
- Correlation and Diversification Analysis
- Strategic Asset Allocation Framework
- Portfolio Weight and Constraint Model
- Benchmark and Performance Review Scorecard



Day 5: Investment Decision Practice

- Suggested Exercise: Objective and Constraint Diagnosis
- Suggested Exercise: Time-Value and Return Comparison
- Suggested Exercise: Instrument and Valuation Review
- Suggested Exercise: Diversified Allocation and Performance Check
- Capstone Exercise: Investment Principles Decision Workbook

Practical Exercises

The course uses suggested activities to connect market evidence, calculations, instruments, and portfolio choices.

- Suggested activity: convert an investor situation into objectives, constraints, risk tolerance, and decision criteria.
- Suggested activity: compare cash flows using time-value, return, and risk calculations.
- Suggested activity: classify instruments and record valuation assumptions, advantages, limitations, and portfolio roles.
- Suggested activity: build an allocation, test diversification, and review performance evidence against objectives.

FAQs

Who suits investment principles and portfolio decisions training, and what does it assume?

Investment principles training suits professionals who use basic financial information and need a structured foundation for markets, instruments, risk, return, valuation, and portfolio decisions.

How does investment principles training differ from advanced portfolio management?

Investment principles training builds foundation concepts, calculations, instrument comparisons, and simple allocation decisions, while advanced portfolio management applies deeper quantitative models, optimization, active strategies, and complex performance analysis.

Why is the time value of money important in investment decisions?

The time value of money makes cash flows at different dates comparable through present and future value calculations, supporting consistent evaluation of investment alternatives.

How does diversification affect investment portfolio risk?

Diversification can reduce concentration and asset-specific risk when portfolio holdings respond differently to market conditions, but it does not remove every source of loss.



What evidence supports an investment portfolio decision?

An investment portfolio decision should connect objectives, constraints, instrument characteristics, valuation assumptions, expected return, risk measures, correlations, allocation weights, liquidity, costs, and performance review criteria.

Conclusion

Participants leave with an Investment Principles Decision Workbook containing objectives, calculations, instrument comparisons, valuation assumptions, risk profiles, allocation, and performance records. The workbook changes scattered financial inputs into a traceable investment decision process. It supports consistent comparison, documented assumptions, diversification choices, and review against stated objectives.