



Behavioral Finance and Investment Decision Making Course

29 March – 2 April 2027
San Diego

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Ref: 450_136286 **Date:** 29 March – 2 April 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Behavioral Finance and Investment Decision Making Course is a five-day intermediate course for investment analysts, portfolio professionals, advisers, treasury teams, finance managers, and risk professionals, who leave with a Behavioral Investment Decision File. The course connects market evidence, risk preferences, prospect theory, cognitive and emotional biases, investor sentiment, market anomalies, portfolio choices, committee behavior, and debiasing controls. Agile Leaders Training Center delivers practical behavioral finance and investment decision training.

Who Should Attend

- Investment functions responsible for security and portfolio recommendations
- Wealth and advisory functions responsible for investor choices and communication
- Treasury functions responsible for market exposure and allocation decisions
- Risk functions responsible for challenge, limits, and decision quality
- Finance functions responsible for investment cases and capital decisions
- Governance functions responsible for committee records and decision review

The course assumes participants already use market, portfolio, financial, or risk information and leaves out personal financial advice, trading signals, jurisdiction-specific regulation, and certification preparation.

Departments and Industries

The course supports departments that evaluate financial-market evidence, investor behavior, portfolio choices, and decision controls across institutional and commercial settings.

- Investment research, portfolio management, and asset allocation teams
- Banking, wealth management, and financial advisory functions
- Corporate treasury, finance, and strategic-investment departments
- Risk, compliance, governance, and internal-audit functions
- Insurance, pension, endowment, and family-office investment teams
- Energy, infrastructure, real-estate, and industrial investment functions

Learning Objectives

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



- Apply behavioral finance to investment decisions
- Analyze cognitive and emotional investment biases
- Evaluate framing, loss aversion, and risk preferences
- Compare sentiment, herding, and market-anomaly evidence
- Use debiasing controls in portfolio and committee choices
- Build a Behavioral Investment Decision File

Course Agenda

Day 1: Decision Foundations and Market Evidence

- Traditional and Behavioral Finance Comparison Map
- Investment Decision Cycle and Evidence Gate
- Risk, Return, and Preference Profile
- Bounded Rationality Decision Canvas
- Behavioral Investment Decision Journal

Day 2: Cognitive Biases and Forecasts

- Overconfidence and Calibration Test
- Anchoring and Adjustment Review Sheet
- Representativeness and Base-Rate Checklist
- Availability and Salience Evidence Screen
- Confirmation Bias and Disconfirming Evidence Log

Day 3: Emotional Biases and Investor Choices

- Prospect Theory Value Function Map
- Loss Aversion and Disposition Effect Record
- Framing and Mental Accounting Matrix
- Status Quo and Endowment Effect Test
- Regret, Self-Control, and Familiarity Assessment

Day 4: Markets, Portfolios and Governance

- Investor Sentiment Indicator Dashboard
- Herding and Market-Anomaly Evidence Grid
- Behavioral Portfolio Constraint Review
- Investment Committee Groupthink Challenge
- Pre-Mortem and Debiasing Control Checklist



Day 5: Behavioral Investment Practice

- Suggested Exercise: Bias Diagnosis and Decision Journal
- Suggested Exercise: Forecast Calibration and Evidence Challenge
- Suggested Exercise: Prospect Theory and Portfolio Choice
- Suggested Exercise: Committee Debiasing Review
- Capstone Exercise: Behavioral Investment Decision File

Practical Exercises

The course uses suggested activities to connect behavioral diagnosis, market evidence, portfolio choices, and governed decisions.

- Suggested activity: identify overconfidence, anchoring, availability, and confirmation bias in an investment recommendation.
- Suggested activity: compare choices under alternative frames, loss scenarios, reference points, and mental accounts.
- Suggested activity: test sentiment, herding, and market-anomaly claims against independent evidence.
- Suggested activity: assemble bias findings, alternatives, pre-mortem results, controls, and recommendation records into the capstone file.

FAQs

Who suits behavioral finance and investment decision training, and what does it assume?

Behavioral finance training suits professionals who already evaluate markets, portfolios, financial cases, client choices, or risk evidence and need a controlled method for diagnosing decision bias.

How does behavioral finance training differ from financial-market analysis training?

Behavioral finance training examines how psychology and group dynamics affect investment judgment, while financial-market analysis training concentrates on instruments, valuation, economic drivers, and market data.

How does prospect theory affect investment decisions?

Prospect theory describes choices relative to reference points, with losses often carrying different weight from comparable gains and framing changing how alternatives are perceived.

How can investment teams reduce overconfidence and confirmation bias?

Investment teams can reduce overconfidence and confirmation bias through calibration records, base rates, independent challenge, disconfirming evidence, pre-mortems, decision journals, and defined review gates.



Why do herding and investor sentiment matter in financial markets?

Herding and investor sentiment matter because shared narratives, imitation, attention, and emotional reactions can influence demand, valuation, volatility, and the persistence or reversal of market moves.

Conclusion

Participants take back a Behavioral Investment Decision File containing preference profiles, bias tests, decision journals, sentiment reviews, portfolio challenges, pre-mortems, and recommendation records. The file changes unexamined judgment into a traceable decision process. It supports transparent assumptions, independent challenge, controlled choices, and reviewable investment recommendations.