



Listed Equity Investing Strategies and Portfolio Construction Training Course

9 – 13 May 2027
Chicago



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Overview

Listed Equity Investing Strategies and Portfolio Construction Training Course is a five-day professional course for investment analysts, portfolio associates, treasury teams, finance managers, and wealth-support professionals who leave with an Equity Strategy and Portfolio Review Plan. Participants connect objectives, company research, valuation, styles, factors, position sizing, diversification, risk, execution, attribution, monitoring, and stewardship. The course replaces isolated stock ideas with a repeatable decision process. Agile Leaders Training Center addresses equity investing through evidence, portfolio discipline, and accountable review.

Who Should Attend

- Investment-analysis teams responsible for company, industry, financial, and valuation research
- Portfolio functions responsible for mandates, benchmarks, construction, monitoring, and review
- Treasury and finance teams responsible for evaluating listed-equity exposures
- Wealth-management support teams responsible for research, reporting, and portfolio operations
- Risk and performance teams responsible for exposures, attribution, and control evidence
- Governance teams responsible for stewardship, conflicts, voting, and investment oversight

The course assumes participants already work with financial statements, investments, portfolios, or performance information and leaves out personal investment recommendations and external certification preparation.

Departments and Industries

The course supports departments and industries that analyze, allocate to, monitor, or oversee listed equities.

- Asset management, wealth management, private banking, and brokerage functions
- Treasury, corporate finance, investment-office, and family-office teams
- Pension, insurance, endowment, foundation, and institutional-investor functions
- Equity research, portfolio management, performance, risk, and trading teams
- Banking, professional services, fintech, and financial-data organizations
- Governance, compliance, stewardship, operations, and investment-committee support

Learning Objectives

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



- Build an equity mandate, universe, benchmark, and research process
- Analyze company quality, industry structure, statements, forecasts, and risks
- Apply absolute, relative, dividend, and free-cash-flow valuation methods
- Compare value, growth, quality, income, momentum, and factor strategies
- Design position sizing, diversification, risk, execution, and monitoring rules
- Evaluate performance attribution, stewardship evidence, and strategy discipline

Course Agenda

Day 1: Equity Mandate and Research Architecture

- Investment Objectives and Constraints Statement
- Listed-Equity Universe and Eligibility Rules
- Benchmark and Active-Risk Framework
- Top-Down and Bottom-Up Research Map
- Investment Thesis and Evidence Checklist

Day 2: Company Analysis and Valuation

- Business Model and Competitive-Advantage Assessment
- Industry Structure and Cycle Analysis
- Financial Statement and Earnings-Quality Review
- Dividend and Free-Cash-Flow Valuation Model
- Comparable-Multiple and Sensitivity Matrix

Day 3: Equity Styles and Strategy Rules

- Value and Margin-of-Safety Screen
- Growth and Expectation-Risk Assessment
- Quality and Financial-Strength Scorecard
- Income and Dividend-Sustainability Framework
- Momentum, Size and Factor-Exposure Map

Day 4: Portfolio Construction and Oversight

- Conviction, Position-Size and Risk-Budget Rules
- Diversification and Concentration Limits
- Scenario, Sensitivity and Drawdown Review
- Execution, Turnover and Trading-Cost Controls
- Stewardship, Conflict and Voting Policy



Day 5: Equity Strategy Review Practice

- Suggested Exercise: Challenge an Investment Thesis
- Suggested Exercise: Compare Valuation Scenarios
- Suggested Exercise: Build a Diversified Equity Portfolio
- Suggested Exercise: Attribute Performance and Test Biases
- Capstone Exercise: Equity Strategy and Portfolio Review Plan

Practical Exercises

Suggested activities connect company evidence, valuation, strategy rules, portfolio exposures, and review decisions.

- Suggested activity: define objectives, constraints, universe, exclusions, benchmark, research sources, thesis requirements, decision authority, and review cadence for a listed-equity mandate.
- Suggested activity: analyze a company's business model, industry, governance, statements, earnings quality, forecasts, cash flows, valuation multiples, scenarios, sensitivities, and thesis-break conditions.
- Suggested activity: compare value, growth, quality, income, and factor candidates, then apply position sizing, diversification, concentration, risk-budget, liquidity, turnover, and execution rules.
- Suggested activity: combine holdings, exposures, benchmark differences, attribution, behavioral-bias checks, stewardship actions, monitoring indicators, buy and sell discipline, and lessons in the capstone plan.

FAQs

What is a listed-equity investing strategy?

A listed-equity strategy defines the investment objective, eligible stocks, benchmark, research process, valuation logic, portfolio rules, risk limits, execution approach, monitoring, and sell discipline used to make and review decisions about publicly traded company shares.

Who is the equity investing strategies course for, and what does it assume?

The course suits analysts, portfolio associates, treasury and finance professionals, wealth-support teams, and investment-oversight functions. It assumes familiarity with financial statements or investment concepts and provides education rather than personal recommendations or a model portfolio for individual use.

How does equity investing strategy differ from a trading course?

Equity strategy emphasizes business analysis, valuation, portfolio construction, risk, ownership, and multi-period review. A trading course typically concentrates more on market microstructure, orders, short-horizon signals, execution tactics, and transaction management.



How are value, growth, and quality stock strategies compared?

Comparison begins with each strategy's thesis, financial characteristics, valuation expectations, factor exposures, risks, holding period, failure conditions, and market environment. Consistent definitions and evidence prevent familiar labels from hiding materially different companies or portfolio exposures.

How should an equity portfolio be monitored?

Monitoring should test thesis evidence, financial results, valuation, exposures, concentration, liquidity, factor drift, risk limits, transaction costs, benchmark-relative results, attribution, stewardship issues, and decision biases. Defined review triggers support disciplined hold, add, reduce, or exit decisions.

Conclusion

Participants leave with an Equity Strategy and Portfolio Review Plan containing the mandate, universe, benchmark, research standards, valuation methods, style rules, portfolio controls, monitoring, attribution, stewardship, and decision triggers. The plan turns separate stock opinions into a traceable investment process. It supports consistent analysis and accountable portfolio review without prescribing individual investments.