



# Strategic Investment and Capital Allocation Training Course

19 – 23 October 2026  
Montreux

## Strategic Investment and Capital Allocation Training Course

**Ref:** 470\_137733 **Date:** 19 – 23 October 2026 **Location:** Montreux **Fees:** 7500 Euro

### Overview

Strategic Investment and Capital Allocation Training Course is a five-day advanced course for investment, corporate finance, treasury, portfolio strategy, business development, family office, and executive teams who leave with a Strategic Investment Decision Book. Participants connect enterprise priorities, investment theses, opportunity screening, strategic fit, competitive advantage, value creation, financial evidence, uncertainty, real options, portfolio coherence, governance gates, and post-investment review. The course turns isolated proposals into comparable capital decisions. Agile Leaders Training Center addresses strategic investment through decision evidence and portfolio governance artifacts.

### Who Should Attend

- Functions responsible for enterprise investment priorities and capital allocation
- Corporate finance teams responsible for investment evidence and funding choices
- Treasury teams responsible for capital capacity and financing constraints
- Portfolio strategy functions responsible for coherence and resource shifts
- Business development teams responsible for opportunity theses and value creation
- Executives and committees responsible for investment gates and post-investment decisions

The course assumes participants already contribute to capital, strategy, finance, portfolio, or investment decisions and leaves out personal investing, securities trading, and basic financial appraisal.

### Departments and Industries

The course supports departments and industries responsible for strategic capital deployment and investment governance.

- Corporate strategy, investment, and portfolio management functions
- Finance, treasury, capital planning, and business development teams
- Investment committees, transformation offices, and internal assurance departments
- Banking, insurance, family office, and asset-owning organizations
- Energy, infrastructure, manufacturing, and telecommunications groups
- Healthcare, technology, logistics, and professional-services enterprises

### Learning Objectives

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



- Analyze strategic priorities and investment capacity
- Build investment theses and screening criteria
- Evaluate strategic fit and value-creation logic
- Apply financial evidence and real-options thinking
- Compare opportunities across a capital portfolio
- Prioritize governance gates and review actions

## **Course Agenda**

### **Day 1: Strategy and Investment Architecture**

- Enterprise Priority and Capital Mandate Map
- Strategic Investment Thesis Canvas
- Opportunity Universe and Screening Funnel
- Strategic Fit and Competitive Advantage Matrix
- Investment Governance and Decision Rights Charter

### **Day 2: Value Creation and Financial Evidence**

- Value-Creation Driver Tree
- Cash-Flow and Capital Requirement Model
- NPV, IRR, and ROIC Comparison Table
- Assumption and Evidence Register
- Investment Case Sensitivity Dashboard

### **Day 3: Uncertainty and Strategic Options**

- Uncertainty and Scenario Decision Map
- Real Options Identification Checklist
- Timing, Scale, and Exit Option Analysis
- Decision Tree and Contingent Commitment Model
- Downside Protection and Trigger Framework

### **Day 4: Portfolio and Governance Decisions**

- Strategic Investment Portfolio Map
- Capital Allocation and Constraint Matrix
- Portfolio Coherence and Concentration Review
- Investment Committee Gate Scorecard
- Post-Investment Thesis Monitoring Dashboard

## Day 5: Strategic Investment Decision Practice

- Suggested Exercise: Challenge an Investment Thesis
- Suggested Exercise: Diagnose Value-Creation Gaps
- Suggested Exercise: Evaluate Strategic Options
- Suggested Exercise: Reallocate a Capital Portfolio
- Capstone Exercise: Strategic Investment Decision Book

## Practical Exercises

The course uses suggested activities to connect strategic priorities, investment evidence, portfolio choices, and accountable decisions.

- Suggested activity: build an investment thesis, screening funnel, strategic-fit matrix, and governance charter.
- Suggested activity: test value drivers, financial evidence, assumptions, sensitivities, and downside conditions.
- Suggested activity: map uncertainty, real options, contingent commitments, triggers, and exit choices.
- Suggested activity: integrate portfolio effects, constraints, gate decisions, owners, and review signals into the capstone book.

## FAQs

### What is strategic investment and capital allocation?

Strategic investment and capital allocation directs financial and management resources toward opportunities that fit enterprise priorities, carry a defensible value-creation thesis, and remain coherent with portfolio constraints and governance choices.

### Who suits strategic investment training, and what does it assume?

Investment, finance, treasury, strategy, business development, family office, portfolio, and executive professionals suit the training. It assumes experience with enterprise decisions and does not teach personal investing, securities trading, or introductory appraisal.

### How does strategic investment differ from investment management training?

Strategic investment focuses on enterprise opportunities, capital allocation, competitive advantage, real options, governance gates, and value creation. Investment management training usually focuses on selecting and managing financial assets for an investor portfolio.



## **How should an investment thesis be tested?**

An investment thesis should be tested against strategic fit, value drivers, competitive advantage, cash-flow evidence, assumptions, uncertainty, alternatives, portfolio effects, decision triggers, and measurable post-investment indicators.

## **What belongs in a strategic investment decision book?**

A strategic investment decision book should connect priorities, theses, screening, strategic fit, value drivers, financial evidence, options, scenarios, constraints, portfolio effects, gate decisions, owners, triggers, and post-investment review.

## **Conclusion**

Participants take back a Strategic Investment Decision Book linking enterprise priorities, investment theses, strategic fit, value creation, financial evidence, real options, portfolio effects, governance gates, and review signals. It changes isolated proposals into comparable capital choices. The book gives investment, finance, strategy, treasury, and executive teams shared evidence, decision rights, triggers, owners, and monitoring logic.