Capital Investment Performance and Risk Management Training Course

4 – 8 January 2027
Lisbon

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Training Center

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Ref: 1282_194799 **Date:** 4 – 8 January 2027 **Location:** Lisbon **Fees:** 5700 Euro

Overview

Capital Investment Performance and Risk Management Training Course is a one-week course for investment, finance, strategy, performance, risk, and governance professionals who leave with a Risk-Adjusted Capital Investment Decision Pack. Participants connect capital investment appraisal with value drivers, portfolio choices, investment performance measurement, and risk-adjusted investment decisions. The course applies financial models, assumptions, scenarios, decision gates, scorecards, and reviews to capital investment performance and capital investment risk management. Agile Leaders Training Center presents disciplined capital investment decision practice.

Who Should Attend

- Functions responsible for capital planning, investment appraisal, and funding recommendations
- Teams responsible for corporate finance, financial modeling, and business-case review
- Functions responsible for strategy, portfolio prioritization, and value delivery
- Teams responsible for risk analysis, governance, and investment assurance
- Functions responsible for performance measurement, benefits realization, and post-investment review

The course assumes participants already work with investment proposals, financial analysis, performance evidence, or risk decisions and leaves out introductory accounting and securities trading.

Departments and Industries

The course supports departments and industries that propose, appraise, approve, finance, monitor, or review capital investments.

- Corporate finance, treasury, and capital-planning functions
- Strategy, portfolio management, and performance functions
- Risk management, governance, and internal audit functions
- Energy, infrastructure, manufacturing, and utilities organizations
- Financial services, technology, and telecommunications organizations
- Public-service and development investment functions

Learning Objectives

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

- Analyze strategic fit, options, value drivers, and critical assumptions
- Build cash-flow, NPV, IRR, and investment appraisal models
- Evaluate uncertainty through sensitivity, scenario, and Monte Carlo analysis
- Prioritize investments with risk-adjusted portfolio criteria
- Build performance measures, benefits scorecards, and variance dashboards
- Apply governance gates and post-investment review evidence

Course Agenda

Day 1: Strategic Investment Framing

- Strategic Investment Thesis Template
- Capital Need and Value-Driver Tree
- Option Screening and Critical Success Matrix
- Stakeholder Requirement and Constraint Register
- Stage-Gate Investment Decision Map

Day 2: Appraisal and Financial Modeling

- Incremental Investment Cash-Flow Model
- NPV and IRR Appraisal Sheet
- Discount Rate and Funding Assumption Register
- Project Affordability and Lifecycle Cost Table
- Investment Appraisal Summary Dashboard

Day 3: Risk and Uncertainty Analysis

- ISO 31000 Investment Risk Process Map
- Sensitivity and Switching-Value Table
- Scenario Analysis Decision Grid
- Monte Carlo Investment Risk Model
- Real Options Flexibility Assessment

Day 4: Portfolio Performance and Governance

- Risk-Adjusted Portfolio Prioritization Matrix
- Investment Committee Decision Pack
- Benefits Realization Scorecard
- Cost, Schedule, and Value Variance Dashboard
- Post-Investment Review Evidence Plan

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Day 5: Investment Decision Practice and Capstone

- Exercise: Strategic Option Screening Challenge
- Exercise: NPV and IRR Assumption Test
- Exercise: Scenario and Sensitivity Risk Review
- Exercise: Portfolio and Benefits Performance Decision
- Capstone Exercise: Risk-Adjusted Capital Investment Decision Pack

Practical Exercises

The course uses suggested activities that connect appraisal evidence, uncertainty, governance, and realized performance.

- Suggested activity: screen competing infrastructure and technology investment options against strategic and financial criteria.
- Suggested activity: test cash-flow assumptions, switching values, and scenarios for an industrial asset proposal.
- Suggested activity: prioritize a mixed investment portfolio using value, affordability, risk, and dependency evidence.
- Suggested activity: prepare an approval decision and post-investment performance review from a case file.

FAQs

Who suits capital investment performance and risk management training?

Capital investment performance and risk management training suits professionals responsible for proposals, appraisal, finance, strategy, portfolios, risk, governance, performance, or assurance and assumes experience with investment evidence or decisions.

How does capital investment performance training differ from introductory capital budgeting training?

Capital investment performance training integrates strategic screening, appraisal, uncertainty, portfolio governance, benefits realization, and post-investment review, while introductory capital budgeting training generally concentrates on foundational financial calculations.

How are capital investment risks reflected in appraisal decisions?

Capital investment risks are reflected through assumption registers, risk identification, sensitivity analysis, switching values, scenarios, simulations, flexibility choices, treatment costs, and decision criteria that expose uncertainty around expected value.

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Which measures support capital investment performance monitoring?

Capital investment performance monitoring uses approved baselines, value drivers, benefit measures, cost and schedule variances, risk indicators, decision gates, and post-investment evidence to compare delivery and outcomes with the investment case.

How does portfolio prioritization improve capital investment decisions?

Portfolio prioritization compares strategic fit, financial value, affordability, risk, dependencies, capacity, and expected benefits so decision makers can allocate constrained resources across competing investments.

Conclusion

The course integrates strategic framing, capital investment appraisal, risk analysis, portfolio governance, performance measurement, and review. Participants take back a Risk-Adjusted Capital Investment Decision Pack containing models, matrices, scenarios, scorecards, dashboards, and decision evidence. The pack creates a traceable route from investment need and assumptions to approval, monitoring, benefits, and corrective action.