



PROJACS ACADEMY
by  **egis**



Strategic Portfolio Management – Advanced Program

18 – 22 December 2023

London / United Kingdom

Introduction

Advanced Portfolio Management Training is a 5-day course where a powerful insight into strategic portfolio management and its central role in the delivery of organizational strategy, maximization of value creation, and efficient allocation of resources and capabilities to achieve organizational strategic objectives. The course makes a valuable contribution to the development of thinking on the translation of strategy into actionable work. Whether you are a senior manager building a high-performing strategic portfolio for your organization searching for new perspectives on strategy execution through portfolio management.

The objective of portfolio management is provide multiple perspectives on the topic, with in-depth guidance on organizational design for strategic portfolio management and covering all process, capability, and leadership aspects of strategic portfolio management.

Moreover, the candidate will learn entire process for the effective deployment of strategic portfolios, bringing together theory and practice for strategic portfolio management

Objectives

- Strategic portfolio management in context
- Developing and managing the strategic portfolio
- Give priority to various projects based on their strategic value
- Optimize the value of projects that are over by making sure that the proper projects are being accomplished in the right order
- Facilitate the portfolio management procedure by concentrating the management attention on the bottlenecks to project accomplishment
- Develop a pattern for determining and using selection requirements to project portfolio elements
- Explain and elaborate the strategic resourcing
- Choose the tools and approaches to equalize a project portfolio
- Portfolio management capabilities

Who Should Attend?

- Program managers
- Product managers
- Portfolio managers
- Senior executives accountable for corporation policies
- Managers accountable for generating organizational policies or for offering strategic recommendations
- Operational managers

Course Outline

Day One

Overview of Portfolio Management

- Managing the resources
- Private sectors vs Federal agencies
- The Project Management Office (PMO)
- Portfolio management architecture

Organizational Strategy and Portfolio Management

- Resources accessibility
- How to prioritize elements of portfolio?
- How to balance out the project portfolio?
- How to deliver investment oversight

Organizational Change and Portfolio Management

- The goal of portfolio documentation
- Quantity metrics
- Project portfolio reports
- Administrative dashboards
- Portfolio risk analysis
- Managing caveats
- Portfolio risk management effective policies
- Seizing investment data

Day Two

Managing the Project Portfolio

- Review the performance of portfolio
- Portfolio evaluations
- The frequency of portfolio evaluation
- Yearly portfolio review
- Factors of success in portfolio management
- Project portfolio management drawbacks
- Portfolio requirements

Active Portfolio Management

- Consensus expected revenue: The CAPM
- Risk
- Outstanding revenue, standards, and added value
- Remaining risk and return
- The principal of dynamic management

Day Three

Expected Revenues and Assessment

- The arbitrage pricing philosophy
- The concept of valuation
- The exercise of valuation

Active Portfolio Management Performance

- Effective predictions
- Information assessment
- Portfolio structure
- Transactions expenses, revenue, and tradeoff
- Implementation Evaluation
- Benchmark timetabling

Investment Management Process

- Difference between investing and financing
- Difference between direct and indirect investment
- Investment environment
- Financial markets
- Investment management procedure

Day Four

Computable Methodologies of Investment Assessment

- Investment income and risk
- Return on investment and expected rate of return
- Investment risk. Variance and standard deviation
- Relationship between risk and return
- Covariance
- Relationship and coefficient of determination
- The revenues on stock vs market portfolio
- Distinctive line and Beta factor
- Residual variance

Portfolio Management and Evaluation

- Difference between active and passive portfolio management
- Difference between strategic and tactical asset distribution
- Managing and modification of the portfolio
- Portfolio performance matrices

Psychological Features of Investment Management

- Boldness
- Character impact
- Insights of investment risk
- Psychological accounting and investing
- Sentiments and investment decisions

Day Five

The Philosophy Behind Investment Portfolio

- The predictable rate of revenue and risk of portfolio
- Capital asset pricing theory
- Market Effectiveness concept

Stocks Investment

- Stock as unique investment
- Stock evaluation for investment decision-making
- How to manage investment in stocks
- Stock estimation
- Creation of stock portfolios
- Stocks investment policies

Training Method

- Pre-assessment
- Live group instruction
- Use of real-world examples, case studies and exercises
- Interactive participation and discussion
- Power point presentation, LCD and flip chart
- Group activities and tests
- Each participant receives a 7” Tablet containing a copy of the presentation, slides and handouts
- Post-assessment

Program Support

This program is supported by interactive discussions, role-play, case studies and highlight the techniques available to the participants.

Schedule

The course agenda will be as follows:

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|---------------------|------------------|
| • Technical Session | 08.30-10.00 am |
| • Coffee Break | 10.00-10.15 am |
| • Technical Session | 10.15-12.15 noon |
| • Coffee Break | 12.15-12.45 pm |
| • Technical Session | 12.45-02.30 pm |
| • Course Ends | 02.30 pm |

Course Fees*

- **5,500 USD**
**VAT is Excluded If Applicable*