



### **Workshop on Active Portfolio Management & Asset Allocation**

April 14 – 18, 2025, 1<sup>st</sup> Run: Lagos & Port Harcourt

October 6 – 10, 2025, 2<sup>nd</sup> Run: Lagos & Abuja

**For Tutor -Led Class:** 9am – 4:30pm

**Workshop fee:** N300, 000 per Participant

**For online:** Delivery via Zoom

**Online course fee:** N250, 000 per Participant

**Available for In-plant Training**

**700 U\$D for foreign  
Participants**

#### **Program Overview:**

This program is designed to review developments and best practices within the industry focusing on asset allocation, portfolio construction, style management strategies, performance measurement and popular thematic trends. The course designed for participants with knowledge of the fundamentals of modern portfolio theory, asset allocation theory, and equity analysis and portfolio construction techniques.

#### **For Whom:**

The course is designed for professionals in private banking and wealth management, Portfolio and Asset Managers, Heads of Investment, Investment Analysts and Advisors, Pension Fund Managers and Trustees, Accountants and Finance Managers, Regulators and Auditors and Compliance Officers.

#### **Learning Objectives:**

At the end of the program, Participants will be able to;

- \* design robust asset allocation models for all market conditions;
- \* build and maintain optimal portfolios based on investors' need;
- \* analyze the key features, advantages and risks of a broad range of asset classes and their performance in different market conditions;
- \* recognize different approaches to identifying and capturing alpha;
- \* gain competitive advantage from understanding behavioral biases and how to manage them; and
- \* apply both the theoretical and practical skills in connection with multi asset class investing.

#### **Course Outline:**

##### **Day 1: An overview of trends within the industry**

- Global trends in the asset management industry
- Developments in product design and development (ETF's, Smart Beta & outcome orientated funds)
- Separation of alpha and beta
- The benefits of a structured wealth management approach
- Open architecture and multi manager approaches
- Changes in investor behavior & preferences

##### **Day2: The 'theoretical' backdrop – tools and concepts**

- Modern portfolio theory and the efficient market hypothesis revisited
- Portfolio diversification and performance
- Asset and portfolio risk and returns
- Exploring risk: investment professionals' perspective and investors perspective(s)

Human Capital Associates Global Consult Ltd is Accredited by Nigeria Council for Management Development (NCMD)

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### Day 3: Understanding asset allocation: Overview of the process

- Different approaches to asset allocation
- The risks and rewards of asset allocation in different market cycles
- Principal protection and principal growth assets
- Re-balancing and reallocation
- Principles and Scope
- Approaches to re-balancing
- Advantages and disadvantages

### Day 4: Building the equity allocation

- Characteristics of a successful investment process
- Equity analysis and Valuation approaches
- Asset allocation and another portfolio construction disciplines
- Asset class characteristics,
  - descriptions and distinguishing qualities
- Asset class: Evaluating Asset Classes,
  - Rates of return, Forecasting expected returns

### Day 5: Risk management

- Types of risk and Measuring risk
- The key ratios and measures
- Exchange-traded fund (ETFs)
- Private equity: Definition and the main sources of Private Equity
- Constructing the Private Equity portfolio
- Monitoring the portfolio and measuring performance
- Structured products
- What are structured products?

#### LOCATIONS

1 - HCA Learning Centre. Acme House 2nd Floor, 23, Acme Road, Ogba, Industrial Scheme, Ikeja, Lagos, Nigeria

2 - Pearls Learning Hub, Plot 756, Opposite Divine Hand of God Ministry, Area 1, Garki, Abuja.

3 – Pakiri hotel Ltd., 4 Okwuruola Street, off Stadium Road, Rumuola, Port Harcourt, Rivers State.

**Open Course Fee: N300, 000**

In-plant Fee Negotiable

#### WORKSHOP FEE:

**N300, 000 per participant, VAT –N22, 500**

Note: this covers Workshop Fee, Tea/coffee break, Lunch, course materials and certificate of attendance.

Payment should be made into our Accounts:

Account Name: Human Capital Associates Global Consult Ltd.

Union Bank of Nig. PLC: Account No: 0097961537

First Bank of Nig. PLC: Account No: 2033683960

Keystone Bank Ltd.: Account No: 1007150325

**For Booking / Enquiry, Call: 234-8051365946, 234-7087578814**

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## Training Methodology

Lectures, discussions, exercises, and case studies will be used to reinforce these teachings/learning methods.

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