# Portfolio Performance Measurement Training Course

Professional Development Training Course Outline

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|---|---|---|---|
| **Category** | Capital Markets and Investment | **Duration** | 5 Days |
| **Base Fee** | $1,500 USD | **Delivery Mode** | Online / On-site Hybrid |

## Course Introduction

Portfolio Performance Measurement Training Course is designed to equip finance professionals, investment managers, and analysts with advanced techniques for evaluating, analyzing, and optimizing investment portfolios. This comprehensive course covers modern portfolio theory, risk-adjusted performance metrics, benchmarking, and performance attribution, ensuring participants gain practical skills to improve portfolio returns while mitigating risk. The curriculum emphasizes real-world applications, case studies, and hands-on exercises to reinforce learning and ensure immediate applicability in professional environments.

In today’s dynamic financial markets, the ability to accurately measure and interpret portfolio performance is critical for maintaining competitive advantage. This course leverages trending methodologies such as the Sharpe Ratio, Treynor Measure, Jensen’s Alpha, and multi-factor performance analysis. Participants will also explore ESG-integrated performance measurement, quantitative analytics, and technology-driven portfolio monitoring tools. By the end of the course, participants will be proficient in evaluating portfolio efficiency, identifying areas for improvement, and making data-driven investment decisions that align with organizational objectives.

## Programme Curriculum

**Portfolio Performance Measurement Training Course**

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**Course Objectives**

1. Understand core principles of portfolio performance measurement and evaluation.
2. Apply risk-adjusted performance metrics including Sharpe, Treynor, and Jensen's Alpha.
3. Analyze portfolio performance using multi-factor attribution techniques.
4. Develop effective benchmarking strategies for equity, fixed income, and mixed portfolios.
5. Integrate ESG and sustainability metrics into portfolio performance analysis.
6. Utilize quantitative analytics and statistical tools for portfolio evaluation.
7. Implement technology-driven tools for continuous performance monitoring.
8. Enhance decision-making with actionable investment insights.
9. Identify underperforming assets and recommend strategic adjustments.
10. Evaluate active versus passive portfolio management effectiveness.
11. Optimize portfolio diversification to reduce risk exposure.
12. Prepare performance reports aligned with regulatory and industry standards.
13. Apply case study scenarios to reinforce practical performance measurement skills.

**Organizational Benefits**

- Improved portfolio return on investment
- Enhanced risk management capabilities
- Informed strategic asset allocation decisions
- Increased efficiency in performance reporting
- Strengthened compliance with regulatory standards
- Data-driven investment decisions
- Higher stakeholder confidence and satisfaction

- Streamlined portfolio review processes
- Advanced analytical skills among finance staff
- Alignment with ESG and sustainability goals

**Target Audiences**

1. Investment Managers
2. Portfolio Analysts
3. Financial Advisors
4. Risk Management Professionals
5. Fund Managers
6. Wealth Management Professionals
7. Corporate Finance Executives
8. Asset Management Teams

**Course Duration: 5 days**

**Course Modules**

**Module 1: Introduction to Portfolio Performance Measurement**

- Overview of portfolio performance concepts
- Importance of performance evaluation in investment management
- Types of portfolios and investment objectives
- Introduction to risk-adjusted returns
- Key industry standards and reporting requirements
- Case study: Evaluating a diversified equity portfolio

**Module 2: Risk-Adjusted Performance Metrics**

- Sharpe Ratio analysis
- Treynor Measure application
- Jensen’s Alpha evaluation
- Sortino Ratio for downside risk
- Comparative analysis of metrics
- Case study: Measuring mutual fund performance

**Module 3: Benchmarking Techniques**

- Selecting appropriate benchmarks
- Relative versus absolute performance measurement
- Custom benchmark construction
- Performance comparison across sectors
- Benchmarking for ESG-integrated portfolios
- Case study: Benchmarking fixed income portfolios

**Module 4: Performance Attribution Analysis**

- Multi-factor attribution methods
- Contribution of asset allocation to returns
- Security selection effect analysis
- Evaluating sector and industry impact
- Risk decomposition techniques
- Case study: Attribution for an actively managed fund

**Module 5: Quantitative Tools and Analytics**

- Statistical models for performance analysis
- Data visualization for portfolio evaluation
- Software tools for portfolio tracking
- Back-testing investment strategies
- Predictive analytics for portfolio optimization
- Case study: Using analytics to enhance equity portfolio

**Module 6: ESG and Sustainable Performance Measurement**

- Integrating ESG metrics into portfolios
- Measuring social and environmental impact
- ESG performance benchmarks
- Reporting ESG-adjusted returns
- Risk management in ESG portfolios
- Case study: ESG performance evaluation for a mixed asset fund

**Module 7: Reporting and Regulatory Compliance**

- Preparing performance reports

- Regulatory standards for investment reporting
- Transparent communication with stakeholders
- Performance disclosure requirements
- Ethical considerations in performance reporting
- Case study: Compliance audit for portfolio reporting

**Module 8: Advanced Portfolio Optimization Strategies**

- Identifying underperforming assets
- Portfolio rebalancing techniques
- Diversification and risk reduction strategies
- Active vs passive management optimization
- Technology-assisted portfolio adjustments
- Case study: Portfolio optimization for high-net-worth clients

**Training Methodology**

- Interactive lectures with real-world examples
- Hands-on exercises using portfolio software tools
- Case studies for practical application
- Group discussions and problem-solving activities
- Simulation of portfolio performance scenarios
- Continuous feedback and assessment

**Register as a group from 3 participants for a Discount**

**Send us an email: info@fineskilltrainingcenter.org or call** *+254769199797*

***Certification***

*Upon successful completion of this training, participants will be issued with a globally- recognized certificate.*

***Tailor-Made Course***

*We also offer tailor-made courses based on your needs.*

**Key Notes**

**a.** The participant must be conversant with English.

**b.** Upon completion of training the participant will be issued with an Authorized Training Certificate

**c.** Course duration is flexible and the contents can be modified to fit any number of days.

**d.** The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

**e.** One-year post-training support Consultation and Coaching provided after the course.

**f.** Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

## Upcoming Scheduled Sessions

| Start Date | End Date | Location | Price |
|---|---|---|---|
| **23 Nov 2026** | 27 Nov 2026 | Online | $1,000 |
| **23 Nov 2026** | 27 Nov 2026 | Physical | $1,500 |
| **23 Nov 2026** | 27 Nov 2026 | Physical | $3,000 |
| **23 Nov 2026** | 27 Nov 2026 | Physical | $3,000 |
| **23 Nov 2026** | 27 Nov 2026 | Physical | $6,000 |
| **23 Nov 2026** | 27 Nov 2026 | Physical | $4,500 |
| **23 Nov 2026** | 27 Nov 2026 | Physical | $6,000 |
| **23 Nov 2026** | 27 Nov 2026 | Physical | $6,000 |

Ready to enroll or request a customized program? Book online or contact us:

**Register Online Now**

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