

## Basic Program on Smart Investing Strategies and Portfolio Management

### Objective:

Wealth creation and wealth preservation is of paramount importance to everyone and even if someone else is managing your investments, most of the principles in this course will help you in guiding your investment advisor and assessing their capability. Portfolio Management is more than good stock picking. It is managing a collection of stocks so as to minimize risk and maximize returns.

A well-managed portfolio can create significant wealth and can be truly transformational in meeting life goals.

### Target Audience:

- Working professionals interested in asset management in their careers
- Individuals preparing for advanced degrees in finance and economics
- Individuals looking to acquire the knowledge and tools in order to establish a portfolio that fits their needs and goals and improves their personal investment performance
- Investors looking to improve their portfolio and investment strategies

### Curriculum:

Day 1	
Session 1	Session 2
Lessons from the Index	Mid Cap Stocks as Options
	Safety in Numbers
	Checklist for Stocks
Session 3	
Buying Secular Growth Stories	
Leave the Cyclical for Professional Investors	

Day 2	
Session 4	Session 5
Managing Large Holdings	Maintaining Quality of Portfolio
Stock Concentration	Portfolio Approach
Selling a Stock	
Session 6	
Strategy in Bull Markets	
Strategy in Bear Markets	
Timing the Market Vs Time in the Market	
Managing Expectations	
Managing Impact of Unpredictable Events	
Calculating Returns	