

Postgraduate Certificate Portfolio Management





Postgraduate Certificate Portfolio Management

- » Modality: online
- » Duration: 6 weeks
- » Certificate: TECH Global University
- » Credits: 6 ECTS
- » Schedule: at your own pace
- » Exams: online
- » Target Group: Graduates in Business Administration, Economics and other business-related degrees.
As well as company executives and people involved or interested in the business world

Website: www.techtute.com/us/school-of-business/postgraduate-certificate/portfolio-management

Index

01

Welcome

p. 4

02

Why Study at TECH?

p. 6

03

Why Our Program?

p. 10

04

Objectives

p. 14

05

Structure and Content

p. 18

06

Methodology

p. 24

07

Our Students' Profiles

p. 32

08

Course Management

p. 36

09

Impact on Your Career

p. 40

10

Benefits for Your Company

p. 44

11

Certificate

p. 48

01

Welcome

Sometimes, and due to lack of time or knowledge, investors prefer to delegate the last decision regarding their operations. These operations are carried out based on the risk tolerance expressed by the client. Opening an important business route for both. However, Portfolio Management requires great market knowledge, as well as a special sensitivity to communicate with the investor. For this reason, TECH has developed an extensive program that combines client profile analysis and specific learning related to portfolio trading. It also included different measurement ratios and the latest investment criteria. Contents that will be taught in a totally online modality and without schedules, thus favoring conciliation by the student.



Postgraduate Certificate in Portfolio Management.
TECH Global University



“

Enroll and learn how to agree with the client on investment objectives so that both parties are satisfied

02

Why Study at TECH?

TECH is the world's largest 100% online business school. It is an elite business school, with a model based on the highest academic standards. A world-class center for intensive managerial skills education.



“

TECH is a university at the forefront of technology, and puts all its resources at the student's disposal to help them achieve entrepreneurial success"

At TECH Global University



Innovation

The university offers an online learning model that balances the latest educational technology with the most rigorous teaching methods. A unique method with the highest international recognition that will provide students with the keys to develop in a rapidly-evolving world, where innovation must be every entrepreneur's focus.

"*Microsoft Europe Success Story*", for integrating the innovative, interactive multi-video system.



The Highest Standards

Admissions criteria at TECH are not economic. Students don't need to make a large investment to study at this university. However, in order to obtain a qualification from TECH, the student's intelligence and ability will be tested to their limits. The institution's academic standards are exceptionally high...

95% | of TECH students successfully complete their studies



Networking

Professionals from countries all over the world attend TECH, allowing students to establish a large network of contacts that may prove useful to them in the future.

+100000

executives prepared each year

+200

different nationalities



Empowerment

Students will grow hand in hand with the best companies and highly regarded and influential professionals. TECH has developed strategic partnerships and a valuable network of contacts with major economic players in 7 continents.

+500

collaborative agreements with leading companies



Talent

This program is a unique initiative to allow students to showcase their talent in the business world. An opportunity that will allow them to voice their concerns and share their business vision.

After completing this program, TECH helps students show the world their talent.



Multicultural Context

While studying at TECH, students will enjoy a unique experience. Study in a multicultural context. In a program with a global vision, through which students can learn about the operating methods in different parts of the world, and gather the latest information that best adapts to their business idea.

TECH students represent more than 200 different nationalities.



TECH strives for excellence and, to this end, boasts a series of characteristics that make this university unique:



Analysis

TECH explores the student's critical side, their ability to question things, their problem-solving skills, as well as their interpersonal skills.



Academic Excellence

TECH offers students the best online learning methodology. The university combines the *Relearning* methodology (the most internationally recognized postgraduate learning methodology) with Harvard Business School case studies. A complex balance of traditional and state-of-the-art methods, within the most demanding academic framework.



Economy of Scale

TECH is the world's largest online university. It currently boasts a portfolio of more than 10,000 university postgraduate programs. And in today's new economy, **volume + technology = a groundbreaking price**. This way, TECH ensures that studying is not as expensive for students as it would be at another university.



Learn with the best

In the classroom, TECH's teaching staff discuss how they have achieved success in their companies, working in a real, lively, and dynamic context. Teachers who are fully committed to offering a quality specialization that will allow students to advance in their career and stand out in the business world.

Teachers representing 20 different nationalities.



At TECH, you will have access to the most rigorous and up-to-date case analyses in academia"

03

Why Our Program?

Studying this TECH program means increasing the chances of achieving professional success in senior business management.

It is a challenge that demands effort and dedication, but it opens the door to a promising future. Students will learn from the best teaching staff and with the most flexible and innovative educational methodology.



“

We have highly qualified teachers and the most complete syllabus on the market, which allows us to offer you education of the highest academic level”

This program will provide you with a multitude of professional and personal advantages, among which we highlight the following:

01

A Strong Boost to Your Career

By studying at TECH, students will be able to take control of their future and develop their full potential. By completing this program, students will acquire the skills required to make a positive change in their career in a short period of time.

70% of students achieve positive career development in less than 2 years.

02

Develop a strategic and global vision of the company

TECH offers an in-depth overview of general management to understand how each decision affects each of the company's different functional fields.

Our global vision of companies will improve your strategic vision.

03

Consolidate the student's senior management skills

Studying at TECH means opening the doors to a wide range of professional opportunities for students to position themselves as senior executives, with a broad vision of the international environment.

You will work on more than 100 real senior management cases.

04

You will take on new responsibilities

The program will cover the latest trends, advances and strategies, so that students can carry out their professional work in a changing environment.

45% of graduates are promoted internally.

05

Access to a powerful network of contacts

TECH connects its students to maximize opportunities. Students with the same concerns and desire to grow. Therefore, partnerships, customers or suppliers can be shared.

You will find a network of contacts that will be instrumental for professional development.

06

Thoroughly develop business projects

Students will acquire a deep strategic vision that will help them develop their own project, taking into account the different fields in companies.

20% of our students develop their own business idea.

07

Improve soft skills and management skills

TECH helps students apply and develop the knowledge they have acquired, while improving their interpersonal skills in order to become leaders who make a difference.

Improve your communication and leadership skills and enhance your career.

08

You will be part of an exclusive community

Students will be part of a community of elite executives, large companies, renowned institutions, and qualified teachers from the most prestigious universities in the world: the TECH Global University community.

We give you the opportunity to study with a team of world-renowned teachers.

04 Objectives

You will acquire the necessary knowledge to manage portfolios efficiently through this program. You will convert the client's needs into real investments, know the legal framework related to Portfolio Management, become familiar with the necessary operations to make investments and learn to measure the profitability of said investments.



“

Agreeing on an affordable return is essential in order to maintain a good relationship with the client. TECH teachers will teach you the keys to effective communication

TECH makes the goals of their students their own goals too.
Working together to achieve them.

The **Postgraduate Certificate in Portfolio Management** will enable students to:

01

Analyze the profile of the client likely to hire a portfolio management service

02

Know the legal framework related to Portfolio

03

Management Master concepts related to Portfolio Management such as profitability, risk and diversification, as well as the new investment criteria





04

Working with investment measurement ratios

05

Use Excel for wallet management

06

Delve deeper into the study of new Investments criteria

05

Structure and Content

TECH works with the *Relearning* teaching methodology. This means that the most important Portfolio Management concepts are repeated progressively throughout the syllabus. This allows the student to learn them in a natural way, reducing the number of study hours. Furthermore, these contents will be available 24 hours a day, making it easier to combine work and personal life.



“

By doing this program you will learn to carry out an adequacy test to determine a person's investment objectives, their financial situation and their knowledge of financial markets”

Syllabus

The most demanding financial reality requires leaders adapted to the new economic paradigms, with up-to-date tools and improved investment skills.

In this way, this program's agenda delves into Portfolio Management and its mechanisms. As well as into the analysis of the client's profile and the calculation of the profitability of their investments.

Nevertheless, this program does not only focus on the theory related to Portfolio Management. But also in the development of transversal competencies and distinctive leadership. Going beyond the basic skills necessary and indispensable in today's labor market.

To this end, a variety of case studies and simulated scenarios are presented. In which students will develop their managerial and organizational skills to become first-line team managers.

A plan aimed at professionals interested in leading and managing workforces, a unique opportunity to enhance managerial and organizational skills. Understanding the needs of today's market and specializing in exceeding them by far.

This Postgraduate Certificate takes place over six weeks and consists of one module:

Module 1

Portfolio Management



Where, When and How is it Taught?

TECH offers the possibility of developing this Postgraduate Certificate in Portfolio Management completely online. During the 6 weeks of the specialization, the student will be able to access all the contents of this program at any time, which will allow the students to self-manage their study time.

A unique, key, and decisive educational experience to boost your professional development and make the definitive leap.

Module 1. Portfolio Management

1.1. Client Profile Analysis

- 1.1.1. Investment Objective
- 1.1.2. Investment Returns and Client Risk
- 1.1.3. Horizon

1.2. Contracts and Regulations

- 1.2.1. MiFID 2
- 1.2.2. Suitability Test
- 1.2.3. At Risk Profiles

1.3. Wallet Management Introduction

- 1.3.1. Market Efficiencies
- 1.3.2. Market Failures
- 1.3.3. Active Management vs Passive Management

1.4. Return and Risk

- 1.4.1. Of an Asset
- 1.4.2. Of the Wallet
- 1.4.3. Normality Hypothesis

1.5. Diversification

- 1.5.1. Types of Risk
- 1.5.2. Correlation
- 1.5.3. Beta

1.6. Wallet Theory

- 1.6.1. Efficient Wallet
- 1.6.2. CML
- 1.6.3. SML

1.7. Measurement Ratios I

- 1.7.1. Sharpe Ratio
- 1.7.2. Treynor Ratio
- 1.7.3. Jensen Alpha

1.8. Measurement Ratios II

- 1.8.1. *Tracking Error*
- 1.8.2. Information Ratio
- 1.8.3. Consistency

1.9. Excel for Wallet Management

- 1.9.1. Data Sources
- 1.9.2. Sheet Programming
- 1.9.3. Interpretation of Results

1.10. New Investment Criteria in Wallet Management

- 1.10.1. ESG
- 1.10.2. Alpha Portable
- 1.10.3. MFI

“

TECH teachers will teach you the differences between active and passive management so that you can respond to customer demands”

06

Methodology

This academic program offers students a different way of learning. Our methodology uses a cyclical learning approach: **Relearning.**

This teaching system is used, for example, in the most prestigious medical schools in the world, and major publications such as the **New England Journal of Medicine** have considered it to be one of the most effective.





“

Discover Relearning, a system that abandons conventional linear learning, to take you through cyclical teaching systems: a way of learning that has proven to be extremely effective, especially in subjects that require memorization"



TECH Business School uses the Case Study to contextualize all content

Our program offers a revolutionary approach to developing skills and knowledge. Our goal is to strengthen skills in a changing, competitive, and highly demanding environment.

“

At TECH, you will experience a learning methodology that is shaking the foundations of traditional universities around the world”



This program prepares you to face business challenges in uncertain environments and achieve business success.



Our program prepares you to face new challenges in uncertain environments and achieve success in your career.

A learning method that is different and innovative

This TECH program is an intensive educational program, created from scratch to present executives with challenges and business decisions at the highest level, whether at the national or international level. This methodology promotes personal and professional growth, representing a significant step towards success. The case method, a technique that lays the foundation for this content, ensures that the most current economic, social and business reality is taken into account.

“

You will learn, through collaborative activities and real cases, how to solve complex situations in real business environments”

The case method has been the most widely used learning system among the world's leading business schools for as long as they have existed. The case method was developed in 1912 so that law students would not only learn the law based on theoretical content. It consisted of presenting students with real-life, complex situations for them to make informed decisions and value judgments on how to resolve them. In 1924, Harvard adopted it as a standard teaching method.

What should a professional do in a given situation? This is the question we face in the case method, an action-oriented learning method. Throughout the program, the studies will be presented with multiple real cases. They must integrate all their knowledge, research, argue and defend their ideas and decisions.

Relearning Methodology

TECH effectively combines the Case Study methodology with a 100% online learning system based on repetition, which combines different teaching elements in each lesson.

We enhance the Case Study with the best 100% online teaching method: Relearning.

Our online system will allow you to organize your time and learning pace, adapting it to your schedule. You will be able to access the contents from any device with an internet connection.

At TECH you will learn using a cutting-edge methodology designed to train the executives of the future. This method, at the forefront of international teaching, is called Relearning.

Our online business school is the only one in the world licensed to incorporate this successful method. In 2019, we managed to improve our students' overall satisfaction levels (teaching quality, quality of materials, course structure, objectives...) based on the best online university indicators.



In our program, learning is not a linear process, but rather a spiral (learn, unlearn, forget, and re-learn). Therefore, we combine each of these elements concentrically.

With this methodology we have trained more than 650,000 university graduates with unprecedented success in fields as diverse as biochemistry, genetics, surgery, international law, management skills, sports science, philosophy, law, engineering, journalism, history, markets, and financial instruments. All this in a highly demanding environment, where the students have a strong socio-economic profile and an average age of 43.5 years.

Relearning will allow you to learn with less effort and better performance, involving you more in your specialization, developing a critical mindset, defending arguments, and contrasting opinions: a direct equation to success.

From the latest scientific evidence in the field of neuroscience, not only do we know how to organize information, ideas, images and memories, but we know that the place and context where we have learned something is fundamental for us to be able to remember it and store it in the hippocampus, to retain it in our long-term memory.

In this way, and in what is called neurocognitive context-dependent e-learning, the different elements in our program are connected to the context where the individual carries out their professional activity.



This program offers the best educational material, prepared with professionals in mind:



Study Material

All teaching material is produced by the specialists who teach the course, specifically for the course, so that the teaching content is highly specific and precise.

These contents are then applied to the audiovisual format, to create the TECH online working method. All this, with the latest techniques that offer high quality pieces in each and every one of the materials that are made available to the student.



Classes

There is scientific evidence suggesting that observing third-party experts can be useful.

Learning from an Expert strengthens knowledge and memory, and generates confidence in future difficult decisions.



Management Skills Exercises

They will carry out activities to develop specific executive competencies in each thematic area. Practices and dynamics to acquire and develop the skills and abilities that a high-level manager needs to develop in the context of the globalization we live in.



Additional Reading

Recent articles, consensus documents and international guidelines, among others. In TECH's virtual library, students will have access to everything they need to complete their course.





Case Studies

Students will complete a selection of the best case studies chosen specifically for this program. Cases that are presented, analyzed, and supervised by the best senior management specialists in the world.



Interactive Summaries

The TECH team presents the contents attractively and dynamically in multimedia lessons that include audio, videos, images, diagrams, and concept maps in order to reinforce knowledge.

This exclusive educational system for presenting multimedia content was awarded by Microsoft as a "European Success Story".



Testing & Retesting

We periodically evaluate and re-evaluate students' knowledge throughout the program, through assessment and self-assessment activities and exercises, so that they can see how they are achieving their goals.



07

Our Students' Profiles

The variety of professional profiles attracted by this Postgraduate Certificate in Portfolio Management is an excellent opportunity to do *Networking*. Students will meet not only managers and professionals from the world of finance, but also entrepreneurs and people with whom to share ambitions and goals. Therefore, the program is also a place to meet potential business partners, customers or suppliers.





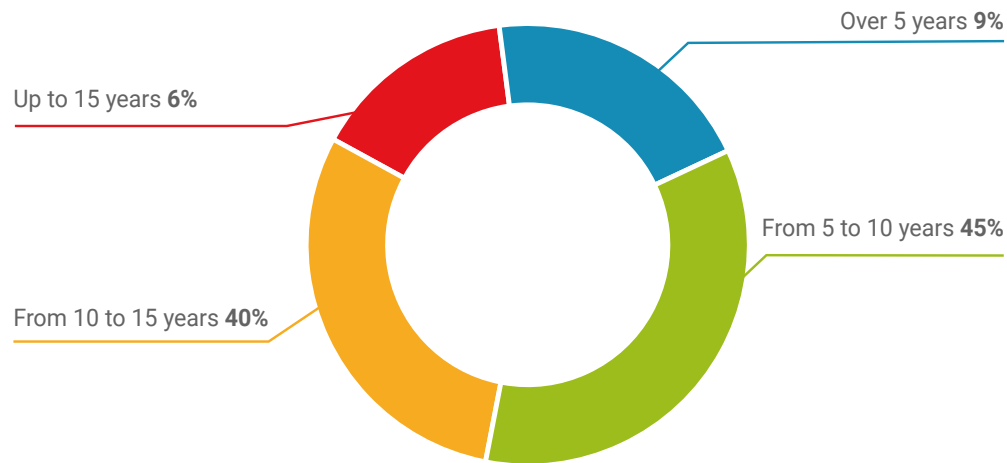
“

Graduates from this Postgraduate Certificate will be prepared to lead Portfolio Management teams and work with a large number of clients simultaneously”

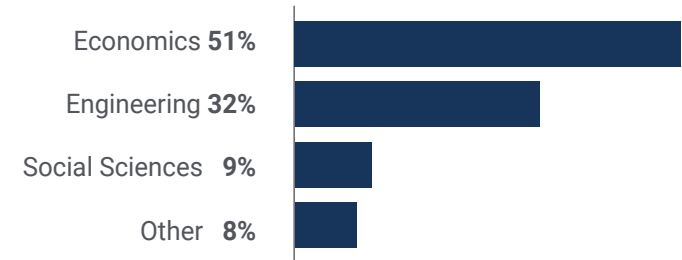
Average Age

Between **35** and **45** years old

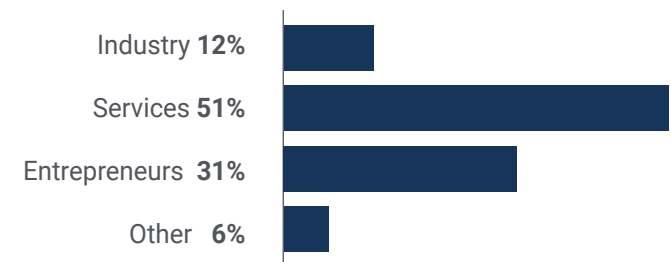
Years of Experience



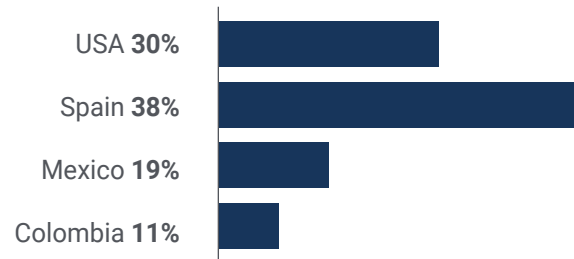
Training



Academic Profile



Geographical Distribution



Alejandro Díaz Díaz

CEO

"In my company we have a good team of portfolio managers. However, I admit that my leadership skills were not the best. So before the problem got bigger, I decided to enroll in TECH and hone my skills. It's only been a month since I graduated and my employees have already congratulated me on the change. I am very grateful to this degree's teacher staff"

08

Course Management

TECH has selected a teaching staff with extensive educational backgrounds. In addition to experience in prestigious companies. Therefore, they are professionals who have mastered Portfolio Management. In this way, the student will be supported throughout the learning process and will receive answers to the most specific doubts that may arise.



“

In this Postgraduate Certificate, you will know the requirements of the European regulation MiFID 2 so that you can operate without the risk of leaving the legal framework”

Management



Dr. Olivares Pont, Manuel

- ◆ Wealth Manager at GPM
- ◆ Wealth Manager at Andbank Spain
- ◆ Wealth Manager at Esfera Capital A.V.
- ◆ Wealth Manager at Q-Renta AV
- ◆ Managing Partner of ARBD Consulting
- ◆ Personal Banking Consultant and Financial Advisor at Banco Mediolanum
- ◆ Consultant of EFA Certification and Financial Instruments for Commercial Networks at ISEFI, SANFI and Praxis MMT
- ◆ Degree in Business Administration from Universidad Complutense de Madrid.

Professors

Mr. García Bahillo, Luis Miguel

- ◆ Investment Manager at GPRA Capital
- ◆ Wealth Manager at GPM SV
- ◆ Lecturer of Courses related to Financial Advisory
- ◆ Graduate in Economics from the Complutense University of Madrid



09

Impact on Your Career

TECH seeks the greatest positive impact on students' professional career path. Therefore, not only are you provided with the most up-to-date knowledge in Portfolio Management, but also with all the theory which is complemented with the most important competencies that a current leader should have. As a result, the graduate will be able to position themselves as a top-level manager.



“

Throughout the program, you will learn to work with the tracking error method to measure the probability that a portfolio deviates from the reference index”

Are you ready to take the leap? Excellent professional development awaits you

TECH's Postgraduate Certificate in Portfolio Management is an intensive program that prepares students to face business challenges and decisions in the field of global economy. Its primary objective is to promote personal and professional growth,, you achieve success.

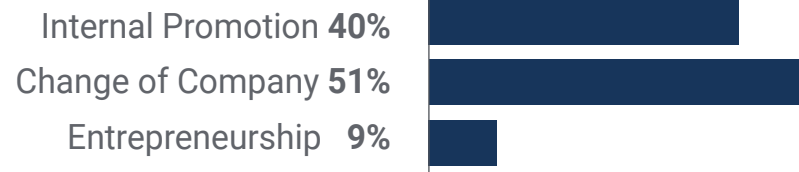
The program includes a topic to deal with Excel sheets applied to Portfolio Management.

TECH teachers will provide you with tips for working with efficient portfolios and retaining the maximum number of customers.

When the change occurs



Type of change



Salary increase

This program represents a salary increase of more than **25.22%** for our students



10

Benefits for Your Company

Graduates will be prepared to immediately incorporate all their knowledge into daily practice. This implies that companies will benefit, since the management and investment planning capacity of their executives will be improved.



“

In an increasingly fast-paced world, allowing clients to delegate certain responsibilities becomes a great business opportunity. Enroll in this program and relaunch your professional career”

Developing and retaining talent in companies is the best long-term investment.

01

Growth of talent and intellectual capital

The professional will introduce the company to new concepts, strategies, and perspectives that can bring about significant changes in the organization.

02

Retaining high-potential executives to avoid talent drain

This program strengthens the link between the company and the professional and opens new avenues for professional growth within the company.

03

Building agents of change

You will be able to make decisions in times of uncertainty and crisis, helping the organization overcome obstacles.

04

Increased international expansion possibilities

Thanks to this program, the company will come into contact with the main markets in the world economy.



05

Project Development

The professional can work on a real project or develop new projects in the field of R & D or business development of your company.

06

Increased competitiveness

This program will equip students with the skills to take on new challenges and drive the organization forward.

11 Certificate

The Postgraduate Certificate in Portfolio Management guarantees students that, in addition to the most rigorous and up-to-date education, they can access to a Postgraduate Certificate issued by TECH Global University.





“

Successfully complete this program and receive your university qualification without having to travel or fill out laborious paperwork”

This program will allow you to obtain your **Postgraduate Certificate in Portfolio Management** endorsed by **TECH Global University**, the world's largest online university.

TECH Global University is an official European University publicly recognized by the Government of Andorra ([official bulletin](#)). Andorra is part of the European Higher Education Area (EHEA) since 2003. The EHEA is an initiative promoted by the European Union that aims to organize the international training framework and harmonize the higher education systems of the member countries of this space. The project promotes common values, the implementation of collaborative tools and strengthening its quality assurance mechanisms to enhance collaboration and mobility among students, researchers and academics.

This **TECH Global University** title is a European program of continuing education and professional updating that guarantees the acquisition of competencies in its area of knowledge, providing a high curricular value to the student who completes the program.

Title: **Postgraduate Certificate in Portfolio Management**

Modality: **online**

Duration: **6 weeks**

Accreditation: **6 ECTS**



*Apostille Convention. In the event that the student wishes to have their paper diploma issued with an apostille, TECH Global University will make the necessary arrangements to obtain it, at an additional cost.



Postgraduate Certificate Portfolio Management

- » Modality: online
- » Duration: 6 weeks
- » Certificate: TECH Global University
- » Credits: 6 ECTS
- » Schedule: at your own pace
- » Exams: online

Postgraduate Certificate Portfolio Management

