Garnet
Garnet Global Training Center

GGT-BK-109

Banking, Insurance & Investment

Portfolio Management & Investment Analysis

إدارة المحافظ وتحليل الاستثمار

Duration	Language	Formats	Hours	Level
5 or 10 days	**English or Arabic**	**Classroom, online, in-house**	**35 / 70**	**Intermediate (management)**

Overview

Portfolio Management & Investment Analysis helps participants move from doing the work to managing it, with planning tools, control methods and reporting that management trusts. Credit, risk, compliance and investment programs for banks, insurers and asset managers. It runs as a 5-day or 10-day program in English or Arabic, in classrooms in Dubai, Riyadh, Cairo, London, Istanbul and other cities, or live online, and can be delivered in-house.

What you will be able to do

- Set up and run Portfolio Management & Investment Analysis as a managed process with clear roles.
- Control risk, quality and compliance in this area.
- Lead improvement projects and measure their benefit.
- Report clearly to senior management and stakeholders.
- Manage contractors, suppliers and internal customers.

Who should attend

Bankers, credit and risk analysts, compliance officers, insurance and investment professionals. It suits supervisors, section heads and specialists who manage, or are about to manage, this area.

Key topics

- Regulation and Basel standards
- Credit analysis and provisioning
- Market and liquidity risk
- Products and customer suitability
- Fintech and digital banking
- Case studies from regional banks

Formats and fees

5-day classroom	**USD 4,750**
5-day online	**USD 2,950**
10-day classroom	**USD 8,950**
10-day online	**USD 5,450**
In-house	**Quotation per group**

Fees per participant, excluding VAT.

Register or ask

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Training: training@garnettrainings.com

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Sharjah Publishing City Free Zone, Sharjah, UAE

Certificate

Participants who attend at least 90% of sessions and complete the final assessment receive a certificate of completion stating 35 contact hours (5-day) or 70 contact hours (10-day).

5-day outline

Day 1 Portfolio Management & Investment Analysis: the management framework

- Regulation and Basel standards
- Measurement and reporting

Day 2 Planning, resources and budgets

- Credit analysis and provisioning
- Market and liquidity risk

Day 3 Performance measurement and control

- Products and customer suitability
- Hands-on workshop on a workplace challenge

Day 4 Risk, compliance and improvement

- Fintech and digital banking
- Common mistakes and how to avoid them

Day 5 Management case study and action plan

- Case studies from regional banks
- Regional and international case studies

10-day outline

Day 1 Portfolio Management & Investment Analysis: the management framework

- Regulation and Basel standards
- Measurement and reporting

Day 2 Planning, resources and budgets

- Credit analysis and provisioning
- Market and liquidity risk

Day 3 Performance measurement and control

- Products and customer suitability
- Hands-on workshop on a workplace challenge

Day 4 Risk, compliance and improvement

- Fintech and digital banking
- Common mistakes and how to avoid them

Day 5 Management case study and action plan

- Case studies from regional banks
- Regional and international case studies

Day 6 Advanced techniques and specialist practice

- Complex cases in depth
- Checklists and templates to take away

Day 7 Digital tools, data and automation

- Analysis tools and software
- Using AI in this field

Day 8 Benchmarking against international practice

- Global performance benchmarks
- Group discussion and peer review

Day 9 Capstone project

- Analyse a real challenge from your organisation
- Build the solution and implementation plan

Day 10 Presentations, final assessment and certificates

- Project presentations and review
- Final exam and certificate award

Schedule 2027–2030

Dates	Format	City	Language	Fee (USD)
18–29 Jan 2027	10-day classroom	Abu Dhabi	English	8,950
2–6 May 2027	5-day classroom	Jeddah	English	4,750
16–20 Aug 2027	5-day online	Live online	Arabic	2,950
6–10 Dec 2027	5-day classroom	Dubai	Arabic	4,750
7–18 Feb 2028	10-day online	Live online	Arabic	5,450
16–27 Apr 2028	10-day classroom	Jeddah	Arabic	8,950
16–20 Jul 2028	5-day classroom	Cairo	English	4,750
11–15 Dec 2028	5-day classroom	Vienna	English	4,750
5–9 Mar 2029	5-day classroom	London	English	4,750

Dates	Format	City	Language	Fee (USD)
2–6 Apr 2029	5-day classroom	Dubai	English	4,750
19–30 Nov 2029	10-day classroom	Paris	English	8,950
3–7 Dec 2029	5-day online	Live online	Arabic	2,950
4–15 Mar 2030	10-day online	Live online	English	5,450
8–12 Apr 2030	5-day classroom	Amsterdam	English	4,750
18–22 Aug 2030	5-day classroom	Amman	English	4,750
21 Oct – 1 Nov 2030	10-day classroom	Dubai	Arabic	8,950

Customised and in-house versions of this course are available on request. garnettrainings.com/en/customise/