



Investment Analysis & Portfolio Management Masterclass

Finance & Accounting

QGT-FIN-177 | Masterclass | 5 or 10 days | Online, classroom, in-house

Course overview

Investment Analysis & Portfolio Management Masterclass is a senior-level masterclass on strategy and performance in Investment Analysis & Portfolio Management. It covers the principles, the requirements of IFRS, IIA standards, COSO and GCC tax regulations, and the practical methods used on site, with case studies from operations in the Gulf, Africa and worldwide. Available online, in the classroom in 60 cities, or in-house.

What participants will be able to do

- Explain the principles, terminology and scope of Investment Analysis & Portfolio Management
- Apply the relevant requirements of IFRS, IIA standards, COSO and GCC tax regulations
- Use practical tools, checklists and calculations with confidence
- Recognise common problems, risks and root causes and choose the right corrective action
- Build a business case and roadmap their leadership team can act on

Who should attend

Designed for finance professionals, accountants, auditors and budget holders in senior and leadership roles.

Course outline (5 days)

Day 1: Strategic view of Investment Analysis & Portfolio Management

Trends, regulation and what leading companies do differently

Day 2: Benchmarking and performance

KPIs, maturity models and gap analysis

Day 3: Lessons from major incidents and projects

Decision points that changed outcomes

Day 4: Leading the change

Building the business case, budget and team capability

Day 5: Masterclass forum

Expert panel, peer exchange and personal roadmap

What the 10-day edition adds

Day 6: Applied project, part 1 – Apply the week-one methods to a case from your organisation

Day 7: Data and digital tools – Software, spreadsheets and digital tools used in practice

Day 8: Lessons from incidents and audits – What investigations and audit findings teach

Day 9: Applied project, part 2 – Complete, test and refine your solution

Day 10: Presentations and final assessment – Present to the group and complete the final assessment

Fees (USD per participant)

Duration	Live online	Classroom	In-house
5 days	\$3,000	\$5,500	On quote
10 days	\$5,500	\$9,900	On quote

Fees include course material and certificate of completion; classroom fees include refreshments and lunch. In-house training is priced per group.

Dates and cities 2027–2030

Dates	City	Format	Duration	Fee
11–15 Jan 2027	Kigali	Classroom	5 days	\$5,500
7–18 Feb 2027	Alexandria	Classroom	10 days	\$9,900
17–21 May 2027	Manchester	Classroom	5 days	\$5,500
30 May – 10 Jun 2027	Kuwait City	Classroom	10 days	\$9,900
12–16 Jul 2027	Online (live)	Online (live)	5 days	\$3,000
27–31 Mar 2028	Zurich	Classroom	5 days	\$5,500
9–20 Apr 2028	Muscat	Classroom	10 days	\$9,900
24–28 Apr 2028	Munich	Classroom	5 days	\$5,500
3–14 Jul 2028	Johannesburg	Classroom	10 days	\$9,900
4–8 Dec 2028	Online (live)	Online (live)	5 days	\$3,000
29 Jan – 2 Feb 2029	Abu Dhabi	Classroom	5 days	\$5,500
30 Jul – 10 Aug 2029	Tunis	Classroom	10 days	\$9,900
6–10 Aug 2029	Copenhagen	Classroom	5 days	\$5,500
20–31 Aug 2029	Barcelona	Classroom	10 days	\$9,900
27–31 Aug 2029	Online (live)	Online (live)	5 days	\$3,000
21–25 Jan 2030	London	Classroom	5 days	\$5,500
22 Apr – 3 May 2030	Luanda	Classroom	10 days	\$9,900
9–13 Jun 2030	Muscat	Classroom	5 days	\$5,500
11–22 Aug 2030	Doha	Classroom	10 days	\$9,900
16–20 Sep 2030	Online (live)	Online (live)	5 days	\$3,000

How to register

Register online or scan the code

<https://qimmatrainig.com/courses/investment-analysis-and-portfolio-management-masterclass>

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