

FINANCIAL MANAGEMENT

Chartered Portfolio Manager (CPM)

"The program concentrates on the practical application of financial and capital markets theory, investment and portfolio management and principles at the operational level within the financial services organization, thus providing momentum for continuing professional and personal development."

Certification Issued By

International Financial Institution Society (IFIS - USA)

IFIS is a global network of professional services organization providing Financial, Client Solutions, Assets Management and Accreditation services. We have 62,000 outstanding professionals working together to deliver value in 15 countries.



Membership from

HIGH AUTHORITY COUNCIL FOR ARAB BANKERS (HACAB)

HACAB is a world leading professional membership organisation that promotes, develops and supports banking professionals worldwide. We provide qualifications and professional development, share our knowledge, insight and technical expertise, and protect the quality and integrity of the banking and finance profession.



Learning Outcome

- ✓ Enhance your understanding of capital markets globally and regionally
- ✓ Assess the value of listed companies and reported performance through financial statement analysis
- ✓ Understand the balance of risk/return and time horizon in portfolio management
- ✓ Understand client needs, asset allocation and client retention strategies
- ✓ Market your finance products and services more effectively
- ✓ Identify market opportunities in the localized region and worldwide

Who Should Attend?

- ✓ Executives & Portfolio Managers
- ✓ Wealth Managers and Analysts
- ✓ Hedge Fund Managers
- ✓ Trust Department Managers
- ✓ Fund Managers ETFs and Mutual
- ✓ Retail Branch Managers
- ✓ Corporate Account Managers
- ✓ Family Office professionals
- ✓ Brokerage and Market Analysts
- ✓ Investment Advisors and Financial Planners

- ✓ Investment Managers and Analysts
- ✓ Stock Market Professionals
- ✓ Portfolio and Asset Managers
- ✓ Financial Marketing Professionals
- ✓ Heads of Financial Accounts
- ✓ Financial Controllers
- ✓ Operation and Planning Managers
- ✓ Research Officers and Media Professionals

Eligibility Requirements

You are qualified to take this Certification if you have any of the below requirements:

- ✓ Must have at least one year experience in related field
- ✓ Bachelors or Masters Degree

Course Parts

- ✓ Module 1 The Fundamentals Of Portfolio Management
- ✓ Module 2 Portfolio Types And Construction
- ✓ Module 3 Valuing Stocks, Bonds And Funds – Pricing The Risk/Return Relationship
- ✓ Module 4 Portfolio Theory And Asset Allocation
- ✓ Module 5 Capital Structure Policy And Dividend Policy

How to Register?

- ✓ [Register Online](#) or
- ✓ Fill-up the [registration form](#) and visit the Institute, with the following requirements then pay the necessary fees.
 - passport copy
 - 1 copy of passport size photo
 - eligible certificate copy

Contact Us

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