



## Driving Performance and Innovation in Investment

**Duration:** 5 Days

**Language:** en

**Course Code:** PF1-167

### Objective

By the end of this course, participants will be able to:

- Understand key drivers of hedge fund and investment fund performance.
- Apply innovative portfolio construction and risk management techniques.
- Leverage data analytics, AI, and alternative data in fund management.
- Optimise operational efficiency and governance structures.
- Adapt to evolving market conditions through agile investment practices.

### Audience

This course is ideal for:

- Hedge fund managers and portfolio managers.
- Investment analysts and fund strategists.
- Asset management professionals.
- Financial risk officers and compliance leaders.
- Senior executives in private equity and alternative investments.

## Training Methodology

This course adopts a highly practical, industry-driven approach. Participants will engage in live case studies, portfolio simulation exercises, and interactive workshops focused on applying innovative investment models. The course includes peer discussions, hands-on analysis of real-time data, and expert-led sessions on market innovations. Participants will use advanced modelling tools, review current hedge fund strategies, and work through risk-return trade-offs using real fund scenarios.

## Summary

In an increasingly complex financial landscape, investment firms and hedge funds must blend high performance with constant innovation to maintain competitive advantage. This course delivers a comprehensive framework for enhancing fund performance through innovative investment strategies, advanced analytics, and adaptive management techniques.

Participants will explore how cutting-edge tools, data-driven insights, and agile decision-making can drive superior returns while managing risks effectively. The course combines theory with actionable practices, allowing professionals to rethink traditional models and embrace innovative approaches in portfolio construction, risk management, and fund operations.

## Course Content & Outline

### Section 1: Foundations of Fund Performance and Innovation

- Core performance metrics and value creation in funds.
- Sources of alpha and beta in hedge funds.
- Emerging trends reshaping the investment landscape.

### Section 2: Advanced Portfolio Construction Strategies

- Multi-strategy and absolute return models.
- Leveraging diversification, leverage, and derivatives.
- Innovative approaches to asset allocation.

### Section 3: Data-Driven Investment and Alternative Data

- Integrating AI, machine learning, and big data analytics.
- Using alternative data sources for predictive insights.
- Case studies: quant funds and technology-driven investment models.

#### Section 4: Risk Management and Governance in Innovative Funds

- Advanced risk frameworks (VaR, stress testing, scenario analysis).
- Governance structures and regulatory compliance.
- Mitigating behavioural and systemic risks.

#### Section 5: Operational Innovation and Agile Fund Management

- Streamlining fund operations through automation and fintech solutions.
- Agile leadership and adaptive decision-making in volatile markets.
- Building a sustainable innovation culture in investment firms.
- Final project: Design an innovation strategy for fund performance improvement.

### Certificate Description

Upon successful completion of this training course, delegates will be awarded a Holistique Training Certificate of Completion. For those who attend and complete the online training course, a Holistique Training e-Certificate will be provided.

Holistique Training Certificates are accredited by the British Accreditation Council (BAC) and The CPD Certification Service (CPD), and are certified under ISO 9001, ISO 21001, and ISO 29993 standards.

CPD credits for this course are granted by our Certificates and will be reflected on the Holistique Training Certificate of Completion. In accordance with the standards of The CPD Certification Service, one CPD credit is awarded per hour of course attendance. A maximum of 50 CPD credits can be claimed for any single course we currently offer.

### Categories

Finance, Accounting & Budgeting, Management & Leadership, Quality & Productivity

### Tags

investment plan , Investment Risk , Investment Development , Fund Performance and Innovation , Data-Driven Investment

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