Statement of participation

Adrian Dmitruk

has completed the free course including any mandatory tests for:

Asset allocation in investment

This 9-hour course looked at asset allocation in investment.

Issue date: 26 April 2020

www.open.edu/openlearn

Please go to the course on OpenLearn for full details:
https://www.open.edu/openlearn/money-business/asset-allocation-investment/content-section-0

COURSE CODE: **B861_1**

Asset allocation in investment

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Course summary

This course looks at how to take investor objectives and constraints and turn them into a portfolio which aims at achieving an expected return and level of risk appropriate for the investor. In this free course, Asset allocation in investment, portfolio optimisation techniques such as portfolio theory can be used to determine how much of an investor's portfolio to put in each asset class. Portfolio theory can also be used to determine so-called model portfolios which offer optimised benchmarks for investors with the same objectives and constraints.

Learning outcomes

By completing this course, the learner should be able to:

After studying this course, you should be able to:

- recognise how typical client objectives and constraints impacts on asset allocation
- set client risk and return objectives in the context of an asset allocation process
- describe the reasons for a written investment policy statement and its major components
- recognise typical client objectives and constraints and how these impact on portfolio choice
- explain how to set client risk and return objectives in the context of an asset allocation process

Completed study

The learner has completed the following:

Section 1

Model portfolios and asset classes

Section 2

Risk and return expectations

Section 3

Pensions at a glance

Section 4

Choosing asset classes

Section 5

Yale endowment case study

Section 6

Introduction to investment policy

Section 7

Ethics and regulation

Section 8

Conclusion