CAPITALPFA / FINANCIAL ANALYSIS

Portfolio Analyzer

Show what drives portfolio risk.

Give learners a way to connect asset allocation, diversification and risk to an investment recommendation.

LEARNING FOCUS

- Risk and return
- Correlation and diversification
- Portfolio construction and optimization
- Performance analysis

Where it fits

Investments, portfolio construction, wealth management and applied quantitative finance.

An example learning activity

Compare a two-asset portfolio under two correlation assumptions while holding weights and individual volatilities constant. Explain why risk changes while expected return stays the same.

What an instructor can review

A baseline and stress comparison, stated assumptions, and a short recommendation that explains what could change it.

Confirm the selected release, product access and cohort arrangements with CapitalWave.

View the platform | Request a demonstration