CAPITALWAVE / CAPITALPFA

Portfolio Analyzer

One-session pilot plan

Audience and objective

For finance instructors and training leads teaching diversification and portfolio risk. By the end of the session, learners should be able to answer: What happens to diversification when correlations rise?

Before class

Open the product page and try the instructor demo if offered. Run the exercise, confirm learner access, and decide how you will collect work. Request a walkthrough from the product page if needed.

60-minute session

10 minutes to introduce the decision and record predictions. 35 minutes to work through the analysis. 15 minutes to review results and debrief.

Classroom exercise

Compare a 50/50 portfolio with asset volatilities of 12% and 18%. Raising correlation from 0 to 1 raises portfolio volatility from about 10.82% to 15%.

Evidence and review

A volatility comparison with the weights and assumptions recorded. Check that asset weights and individual volatilities stay fixed, then ask what the result means for allocation.

Scope and decision

Confirm access dates, seats, support, and any fees with CapitalWave. Agree what counts as a successful pilot. Review learner work before expanding to additional cohorts.

Open the product page and find instructor demo access