CAPITALPMS / FACILITATED TRADING SIMULATION

Portfolio Management Simulator

Manage a portfolio through a scenario.

Use a facilitated portfolio exercise to connect an investment mandate, allocation choices and decisions as market conditions evolve.

LEARNING FOCUS

- Mandates and asset allocation
- Portfolio construction
- Sector and currency risk
- Decision and performance review

Where it fits

Portfolio management, wealth management and investment decision workshops.

An example learning activity

For a proposed session, set an investment mandate and introduce a market shock. Ask participants to rebalance or hold, then defend the decision against the mandate and constraints.

What an instructor can review

A pre- and post-scenario allocation, decision log and discussion of mandate adherence and risk.

Confirm release, instruments, format, facilitation and licensing with CapitalWave.

View the platform | Request a demonstration