

# STRATEGIC INVESTMENT PLANNING

(Sunday & Monday) 13<sup>th</sup> & 14<sup>th</sup> April 2025 (2 Days)

09:00AM - 03:00PM

In-person @ UIC premises

Arabic/material in English

FEES FOR UIC MEMBERS  
KWD 195

FEES FOR NON-MEMBERS  
KWD 225



**Alaa Ghanem**

## Introduction:

Strategic investment planning is crucial both for individuals and businesses. It ensures consistency in decision-making, avoiding the temptation to frequently change strategies based on market fluctuations or short-term trends.

By carefully selecting and managing investments, a strategic plan ensures that assets are allocated to the right opportunities that can generate the highest possible returns within an acceptable level of risk.

A strategic plan offers a framework for making investment decisions, preventing impulsive actions driven by emotions, market noise, or temporary market conditions. A solid investment strategy helps achieve long-term wealth growth, rather than focusing on short-term gains that might come with higher risks or volatility.

The goal of this training is to equip participants with the knowledge and tools to make informed, effective investment decisions, both for personal and business purposes.

## Target Audience:

- Managers
- Senior employees
- Head of department
- Directors
- Financial analysts
- Private bankers
- Financial advisors
- Investment bankers
- Portfolio managers
- Customer Service Officer
- Financial risk experts
- Finance Managers



# STRATEGIC INVESTMENT PLANNING

## Outline:

### Module 1: Strategic Investment Planning

- Definition and key components
- The role of investment in financial growth

### Module 2: Types of Investments

- Traditional: stocks, bonds, real estate, private equity
- Alternatives: start-ups, derivatives, mutual funds, ETFs
- Understanding risk and return for each investment type

### Module 3: Establishing Financial Goals

- Short-term vs. long-term objectives
- Aligning investments with financial goals
- Risk tolerance, diversification, liquidity, time horizon

### Module 4: Calculation

- Return on investment (ROI)
- Net asset value (NAV)
- Internal rate of return (IRR)

### Module 5: Evaluating Investment Markets

- Global vs. local investment opportunities
- Evaluating market conditions (economic cycles, interest rates, inflation)

### Module 6: Global Investing

- Understanding international markets
- Risks and rewards of foreign investments (tax, legal, currency risk, geopolitical factors)

### Module 7: Sustainable and Impact Investing

- ESG (Environmental, Social, Governance) factors
- Green Financing
- Socially responsible investing (SRI) and green bonds

### Module 8: Case Study Analysis

- Small groups analyze an investment scenario and present strategies
- Discuss strategic approaches for various markets

### Module 9: Creating a Personal or Organizational Investment Plan

- Developing specific goals and strategies
- Setting timelines and performance benchmarks



# STRATEGIC INVESTMENT PLANNING

## Expert's Profile: Alaa Ghanem

Alaa Ghanem is the CEO of Advisory and Business Company. Alaa has more than 16 years of experience at international and regional conglomerates. He developed and established the financial and equity research departments and the economic advisory units in leading companies in the MENA region like Bank Audi. He participated in tens of financial and economic global conferences and wrote thousands of investment notes and research papers that were published by international and regional newspapers like Bloomberg and Zawya. Alaa graduated in 2007 with distinction from the Lebanese American University in collaboration with George Washington University in USA, with double major in Finance and Economics. He completed his CVA in 2008 and his CFA in 2009. Alaa attended several executive education courses at INSEAD University, University of Cambridge and Yale University.