SOOFASTAEI
EDUCATIONS

AI

Advanced Analytics for Asset Management

Details:

- 5 Sessions
- 10 Modules
- 15 Hours

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PROGRAM OVERVIEW

Artificial intelligence (AI) has grown in presence in asset management and has revolutionized the sector in many ways. It has improved portfolio management, trading, and risk management practices by increasing efficiency, accuracy, and compliance. In particular, AI techniques help construct portfolios based on more accurate risk and return forecasts and more complex constraints. Trading algorithms use AI to devise novel trading signals and execute trades with lower transaction costs. AI also improves risk modelling and forecasting by generating insights from new data sources. Finally, robot-advisors owe a large part of their success to AI techniques. Yet the use of AI can also create new risks and challenges, such as those resulting from model opacity, complexity, and reliance on data integrity.

This program aims to show how to restructure your firm for the AI era and give you a new structure to run your business in a scientific manner, understand that model, and then figure out how to set up your firm from a horizontal capability perspective. The structure of the program is designed based on functional competencies. You will learn them as functional capabilities embedded in the value chain of the firm.

This program does not require any programming or computer science expertise and is designed to introduce the basics of AI to anyone, whether you have a technical background or not.

KEY BENEFITS

The Program is aimed at providing:

- ✓ Understand what AI, its applications and use cases is and how it is transforming our investment;

- ✓ The meaning behind common AI terminology, including neural networks, machine learning, deep learning, and data science;

- ✓ Develop knowledge and skills in analyzing data to inform investment decisions;

- ✓ Identify where and how to apply advanced data analytics in Asset Management;

- ✓ Familiar with the business problems with the data-driven decision-making process in;

- ✓ Explanation of how data is used for Customer Experience Science, Marketing Science, Investing and Sales, Managing the Returns Loop and Performance Evaluation;

- ✓ How to navigate ethical and societal discussions surrounding AI;

- ✓ Articulate advice from experts about learning and starting a career in Asset Management; and

- ✓ How to spot opportunities to apply AI to problems in your organization.

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WHO SHOULD ATTEND THIS PROGRAM?

This course is designed for all C-level / President / Vice President / Director / Head / Manager of:

- ✔ Digital Transformation Managers
- ✔ Business Management
- ✔ Organization Development
- ✔ Project Management
- ✔ IT professionals
- ✔ Asset Management
- ✔ Investment Management
- ✔ Marketing
- ✔ Strategy professionals

📅 Agenda

SESSION 1: INTRODUCTION

Module 1: Introduction

- What is AI?
- History of AI
- Turing Test
- AI Applications
- Types of AI
- Programming Languages for AI
- Success Stories
- Structure of AI

Module 2: Data

- Data Basics
- Types of Data
- Big Data
- Databases and Other Tools
- Crisp-DM
- Data Used In Investments

SESSION 2: CREATING THE MODEL

Module 3: Model Development

- What Is Machine Learning?
- Supervised Learning

- Classification: Random Forest

- Classification: Using Mathematical Functions

- Classification: Simple Linear Classifier

- Classification: Naive Bayes

- Classification: Bayesian Belief Networks

- Classification: K-Nearest Neighbor

- Regression

- Multidimensional Regression

- Unsupervised Learning

- Neural Networks

- Reinforcement Learning

Module 4:
Evaluation, Deployment, and Performance

- Who Performs the Evaluation?

- Problems

- Making The Model Work

- Overfitting And Underfitting

- Scale And Machine Learning

- New Methods

- Bias And Variance

- Backtesting

- Backtesting Protocol

- Deployment

- Performance

SESSION 3:
Customer Experience & Marketing Science

Module 5: Customer Experience Science

- Customer Experience

- Value, Strength, And Duration of Relationship

- Understanding Customers: Empathy For CX Steps To Become an Empathetic Asset

- Management Firm

- Expand Empathy Awareness and Understanding

- Incorporate Into Products and Services

- What Is Automated Empathy and Compassion (AEC)?

- Incorporating AEC Marketing

Module 6: Marketing Science

- How To Apply AI For Marketing
- Begin With Assessment
- Know Your Data
- The AI Plan for Asset Management Marketing
- Perform Strategic Planning
- Manage Product Portfolio With AI
- Transform Your Communications
- Build Relationships
- Execute With Excellence

SESSION 4: Investing and Sales with AI

Module 7: Institutional Investor with AI

- Is Institutional Relationship Management Science (IRMS) Your CRM System?
- Know Thyself: Automated Self-Discovery
- Automated Asset Class Analysis
- Automated Institutional Analysis
- Automated Structure and Terms Analysis
- Automated Fee Analysis
- Automated Communications
- Unleash The Power Of Knowing

Module 8: Sales Science

- What is Sales Science?
- Who Is Responsible For Implementing Sales Science?
- How To Build Your AI-Based Sales System
- Managing the Returns Loop

SESSION 5:

Module 9: Managing the Returns Loop

- Who is Responsible for Investment Management?
- How to Approach Building The New-Era Investment Function?
- The Core Tool Set
- What Will Be The Function of Your Investment Lab?
- How To Make the Decisions
- Research And Investment Strategy
- Assets' Portfolio
- Assets' Performance
- Supply Chain Science
- Change Management
- Managing AI Projects
- Complex Adaptive Systems

Module 10: Governance, Ethics, and Regulatory Compliance and Operations

- Why Intelligent Automation?

- Regulatory Compliance

- Corporate Social Responsibility

- Strategic and Organizational Issues

- How Can AI Help?

- Corporate Governance With AI

- Framing The Ethical Problems From AI

- Ethical Issues

- Humans and AI

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Soofastaei-Educations is an influential global training organization that delivers specialized world-class short- and long-term educational programs.

This organization is a part of Soofastaei Institute, which provides technical business solutions, publications, and educational services in the field of advanced applied analytics and AI in different for different industries.

The Soofastaei Educations works directly with the prestigious universities and giant industrial companies to train the new generation of students and experts for the digitalized future industries.

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