

Practical AI for Investment Management

OVERVIEW

"AI is a technology whose time has come. A combination of abundant data and ever more powerful computing are providing fertile conditions for the rapid development and implementation of ai across investment management and the financial services industry more broadly."

Director, Business: Risk, Culture & Resilience at The Investment Association

Keep up and be ahead in AI. Empower yourself and your teams to navigate the fast evolving landscape of AI and use AI in Investment Management with confidence.

Learn where and how to apply AI to your investment processes using proven, practical methods to improve returns and reduce risks.

LEARNING OUTCOMES

- ✓ Learn the fundamentals of generative AI and general AI and cut through the technical jargon.
- ✓ Learn to leverage data science to make better data-driven decisions in investment strategies
- ✓ Learn where and how to apply AI to your investment processes for maximum impact on returns and risk reduction.
- ✓ Learn to integrate AI in your investment processes with less risk and higher confidence using proven methodologies like Agile DMAIC

COURSE OUTLINE

- **Introduction to Data Science and Fund Management:** Overview of Data Science and its Applications in Finance. Role of Data in Investment Management
Case Study: Data-driven Decision Making in Investment Strategies
- **Fundamentals of AI and Machine Learning for Investment Managers:** Understanding AI and ML in Investments.
Case Study: Application of ML in Portfolio Optimisation
- **Generative AI for Investment Management:** Explore generative AI's role in transforming investment management and improving investment processes. Customising and using Large Language Models like Chat GPT as investment management co-pilots.
- **Implementing AI:** Learn tools, methods, and proven frameworks for high-impact, low-risk AI integration in investment management.
- **Hands-on Practice:** Apply generative AI to your investment strategy and processes using proven industry-standard tools, methods and best practices
- **Best Practices and Takeaways:** Get valuable insights into what it takes to start successful AI initiative and generative AI projects in your investment management firm.



THIS COURSE INCLUDES



**9 hours of total learning of which
4 hours is practical work in the course**



Instructors:

Sam Dias
Director
Publicis Data Science



Dr. Tillman Weyde
Reader in Department of Computer Science
City, University of London
Director Co-founder, Artificial Intelligence & Data
Science at [equitably.ai](https://www.equitably.ai)



John Paul Danaee
Chartered Marketer, Chartered Quality
Professional & Certified Improvement Practitioner
Director Co-founder, Marketing, Project Management
& Quality at [equitably.ai](https://www.equitably.ai)

WHO SHOULD ATTEND

- All investment managers seeking insights into deploying AI for enhanced impact and risk management in their fund strategies.
- Investment managers aiming to implement practical AI tools, optimising investment processes and staying abreast of industry advancements.
- This course will be particularly beneficial for: portfolio managers, risk managers, quantitative analysts, financial analysts, investment strategists, fund operations managers, and professionals involved in asset management and financial decision-making.

