GTC International Consulting Limited
Riverbank House
1 Putney Bridge Approach
Fulham, London, SW6 3BQ
T: +44(0)2037055710
E:enquiries@thegtcgroup.com
W: www.thegtcgroup.com

Robo-Advisory Systems and Algorithmic Portfolio Management

COURSE OVERVIEW

Robo-Advisory Systems and Algorithmic Portfolio Management is a specialized course that provides in-depth knowledge and hands-on experience in designing, evaluating, and implementing automated wealth management solutions. The course helps participants explore the foundational principles and technologies behind robo-advisory platforms, covering algorithmic trading strategies, risk management, regulation, and deployment of AI-powered systems. Through a blend of theoretical concepts with practical applications, participants are enabled to optimize portfolios, leverage data analytics, and innovate digital client experiences in modern, technology-driven investment environments.

WHO SHOULD ATTEND?

This course is tailored for finance professionals, portfolio managers, quantitative analysts, fintech innovators, and data scientists eager to develop or refine skills in automated investment management. It is equally relevant for individuals in asset management firms, banks, and fintech startups, as well as researchers in finance or applied data science seeking to master algorithmic trading, robo-advisory solutions, and digital wealth management. No prior experience in coding is strictly required, but familiarity with finance, programming, or analytics is recommended.

COURSE OUTCOMES

Delegates will gain the skills and knowledge to:

- Design, evaluate, and implement robo-advisory systems for automated wealth management.
- Develop and back-test algorithmic portfolio management strategies that optimize risk-adjusted returns.
- Integrate AI and machine learning tools for personalized investment recommendations and dynamic rebalancing.
- Address legal, ethical, and regulatory considerations in the deployment of robo-advisors.
- Interpret investor preferences and risk parameters to build tailored portfolios.
- Communicate digital investment insights to clients and stakeholders.

KEY COURSE HIGHLIGHTS

At the end of the course, you will understand;

- Foundations and technologies of robo-advisory systems.
- Algorithmic trading models and implementation.
- Digital client onboarding and personalized investment advice.
- AI, machine learning, and data analytics applications in portfolio management.
- Risk management and portfolio optimization algorithms.
- Navigating regulatory and compliance frameworks for digital investing.
- Scaling, deploying, and benchmarking robo-advisory solutions.
- Case studies showcasing robo-advisor deployments and innovations

All our courses are dual-certificate courses. At the end of the training, the delegates will receive two certificates.

1. A GTC end-of-course certificate
2. Continuing Professional Development (CPD) Certificate of completion with earned credits awarded