

# PORTFOLIO CONSTRUCTION FORUM CALENDAR: 1 JAN 2026 – 31 DEC 2026

## Curriculum Knowledge Domains^

- Strategies
- Investment Factors
- Markets
- Investing
- Human Factors
- Finology
- Philosophy

## Delivery

- LSS: Live studio (Sydney)
- LSH: Live site (hosted)
- LSO: Live stream (online)
- ODO: On demand (online)



KD^	Continuing Education Programs (live & on demand)	Description	Date	Delivery
<span style="color: red;">●</span>	Live Studio Series: - Markets Summit (Syd) *	Debating the drivers of and outlook for the markets	25 Feb 2026	LSS/LSH/LSO, ODO
<span style="color: red;">●</span>	- Markets Summit Imp Wshp**	Debating the drivers of and outlook for the markets	05 Mar 2026	LSO
<span style="color: purple;">●</span> <span style="color: red;">●</span> <span style="color: yellow;">●</span> <span style="color: blue;">●</span> <span style="color: green;">●</span>	- Strategies Summit (Syd) *	Debating portfolio construction strategies	19 Aug 2026	LSS/LSH/LSO, ODO
<span style="color: purple;">●</span> <span style="color: red;">●</span> <span style="color: yellow;">●</span> <span style="color: blue;">●</span> <span style="color: green;">●</span>	- Strategies Summit Imp Wshp**	Debating portfolio construction strategies	27 Aug 2026	LSO
<span style="color: purple;">●</span> <span style="color: red;">●</span> <span style="color: yellow;">●</span>	Invitation Only: - Intl Short Course – Pr Mkt (US) **	Building investment solution knowledge and skills	02-08 May 2026	LSH/ODO
<span style="color: yellow;">●</span>	- Research Roundtable (AU/NZ) **	Building fund research knowledge and skills	through the year	LSO, ODO
<span style="color: purple;">●</span> <span style="color: red;">●</span> <span style="color: yellow;">●</span> <span style="color: blue;">●</span> <span style="color: green;">●</span>	- CIMA Connect Zoom **	Exploring contemporary portfolio construction issues	29.01, 30.07, 22.10	LSO
	<b>portfolioconstructionforum.edu.au Library</b>			
<span style="color: purple;">●</span> <span style="color: red;">●</span> <span style="color: yellow;">●</span> <span style="color: blue;">●</span> <span style="color: green;">●</span>	Perspectives – Videos, podcasts & papers# (on-demand) - Viewpoint	Presenting contemporary portfolio construction views	Continuous	ODO
<span style="color: yellow;">●</span>	- Research Spotlight	Presenting quality investment management solutions	Continuous	ODO
<span style="color: yellow;">●</span> <span style="color: blue;">●</span> <span style="color: green;">●</span>	- Rich Pickings – Meet Inv Mgr	Profiling portfolio managers' background and beliefs	Continuous	ODO
<span style="color: blue;">●</span>	Courses (on-demand) - BeFi Invmt Decision-Making Cert	Examining human preferences that shape investment	Continuous	ODO
<span style="color: purple;">●</span> <span style="color: red;">●</span> <span style="color: yellow;">●</span>	- Investment Mgmt Analyst Cert ^	Advancing investment management analyst expertise	Mar – Sep	LSO/ODO

\* Live studio series, open invitation    \*\* Invitation only    ^ Pre-requisite for CIMA certification

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KD^	Continuing Education Programs (live & on demand)	Description	Date	Delivery
<span style="color: red;">●</span>	Live Studio Series: - Markets Summit (Syd) *	Debating the drivers of and outlook for the markets	24 Feb 2027	LSS/LSH/LSO, ODO
<span style="color: red;">●</span>	- Markets Summit Imp Wshp**	Debating the drivers of and outlook for the markets	04 Mar 2027	LSO
<span style="color: purple;">●</span> <span style="color: red;">●</span> <span style="color: yellow;">●</span> <span style="color: blue;">●</span> <span style="color: green;">●</span>	- Strategies Summit (Syd) *	Debating portfolio construction strategies	18 Aug 2027	LSS/LSH/LSO, ODO
<span style="color: purple;">●</span> <span style="color: red;">●</span> <span style="color: yellow;">●</span> <span style="color: blue;">●</span> <span style="color: green;">●</span>	- Strategies Summit Imp Wshp**	Debating portfolio construction strategies	26 Aug 2027	LSO
<span style="color: purple;">●</span> <span style="color: red;">●</span> <span style="color: yellow;">●</span>	Invitation Only: - Intl Short Course – Pr Mkt (US) **	Building investment solution knowledge and skills	01-07 May 2027	LSH/ODO
<span style="color: yellow;">●</span>	- Research Roundtable (AU/NZ) **	Building fund research knowledge and skills	through the year	LSO, ODO
<span style="color: purple;">●</span> <span style="color: red;">●</span> <span style="color: yellow;">●</span> <span style="color: blue;">●</span> <span style="color: green;">●</span>	- CIMA Connect Zoom **	Exploring contemporary portfolio construction issues	28.01, 29.07, 21.10	LSO
	<b>portfolioconstructionforum.edu.au Library</b>			
	<b>Perspectives – Videos, podcasts &amp; papers# (on-demand)</b>			
<span style="color: purple;">●</span> <span style="color: red;">●</span> <span style="color: yellow;">●</span> <span style="color: blue;">●</span> <span style="color: green;">●</span>	- Viewpoint	Presenting contemporary portfolio construction views	Continuous	ODO
<span style="color: yellow;">●</span>	- Research Spotlight	Presenting quality investment management solutions	Continuous	ODO
<span style="color: yellow;">●</span> <span style="color: blue;">●</span> <span style="color: green;">●</span>	- Rich Pickings – Meet Inv Mgr	Profiling portfolio managers' background and beliefs	Continuous	ODO
	<b>Courses (on-demand)</b>			
<span style="color: blue;">●</span>	- BeFi Invmt Decision-Making Cert	Examining human preferences that shape investment	Continuous	ODO
<span style="color: purple;">●</span> <span style="color: red;">●</span> <span style="color: yellow;">●</span>	- Investment Mgmt Analyst Cert ^	Advancing investment management analyst expertise	Mar – Sep	LSO/ODO

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# PORTFOLIO CONSTRUCTION FORUM CALENDAR: CONTINUOUS

## Curriculum Knowledge Domains^

- Strategies
- Investment Factors
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KD^	Continuing Education (cont'd)	Description	Date	Delivery
<span style="color: purple;">●</span> <span style="color: cyan;">●</span>	<b>- Subscriptions &amp; Tools</b>			
<span style="color: purple;">●</span> <span style="color: pink;">●</span> <span style="color: yellow;">●</span> <span style="color: cyan;">●</span> <span style="color: green;">●</span>	Thinking Differently About Mkts	Understanding how economies & markets really work	Continuous	LSO, ODO
<span style="color: purple;">●</span> <span style="color: pink;">●</span> <span style="color: yellow;">●</span> <span style="color: cyan;">●</span> <span style="color: green;">●</span>	CE Library *	Earning accredited hours to meet CE requirements	Continuous	ODO
<span style="color: purple;">●</span> <span style="color: pink;">●</span> <span style="color: yellow;">●</span> <span style="color: cyan;">●</span> <span style="color: green;">●</span>	CIMA CE Library	Earning accredited hrs to meet CIMA CE requirements	Continuous	ODO
<span style="color: purple;">●</span> <span style="color: pink;">●</span> <span style="color: yellow;">●</span> <span style="color: cyan;">●</span> <span style="color: green;">●</span>	MyCE *	Storing, viewing, printing, and exporting CE earned	Continuous	ODO
<span style="color: purple;">●</span> <span style="color: pink;">●</span> <span style="color: yellow;">●</span> <span style="color: cyan;">●</span> <span style="color: green;">●</span>	MyStudyPlan	Managing your progress on courses and certificates	Continuous	ODO
<span style="color: purple;">●</span> <span style="color: pink;">●</span> <span style="color: yellow;">●</span> <span style="color: cyan;">●</span> <span style="color: green;">●</span>	<b>Member communications</b>			
<span style="color: purple;">●</span> <span style="color: pink;">●</span> <span style="color: yellow;">●</span> <span style="color: cyan;">●</span> <span style="color: green;">●</span>	Forum Fodder *	Highlighting latest food for thought from the Forum	Weekly	Email
<span style="color: purple;">●</span> <span style="color: pink;">●</span> <span style="color: yellow;">●</span> <span style="color: cyan;">●</span> <span style="color: green;">●</span>	CE Quarterly *	Highlighting CE-accredited resources	Quarterly	Email
<span style="color: purple;">●</span> <span style="color: pink;">●</span> <span style="color: yellow;">●</span> <span style="color: cyan;">●</span> <span style="color: green;">●</span>	CIMA Circular	Highlighting issues relevant to CIMA Society members	Quarterly	Email
<span style="color: purple;">●</span> <span style="color: pink;">●</span> <span style="color: yellow;">●</span> <span style="color: cyan;">●</span> <span style="color: green;">●</span>	<b>Accreditation Service – MyCE Submissions</b>			
<span style="color: purple;">●</span> <span style="color: pink;">●</span> <span style="color: yellow;">●</span> <span style="color: cyan;">●</span> <span style="color: green;">●</span>	The Forum provides an independent, best-practice, auditable CE accreditation service for our own and our Partners' continuing education learning activities.			
<span style="color: purple;">●</span> <span style="color: pink;">●</span> <span style="color: yellow;">●</span>	<b>Certification</b>			
<span style="color: purple;">●</span> <span style="color: pink;">●</span> <span style="color: yellow;">●</span>	Certified Inv Mgmt Analyst ^	Peak int'l technical portfolio construction certification	Continuous	LSO, ODO

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