

# I. Asset management

## Definition

is the process of developing, operating, maintaining, and cost-effectively selling assets. It involves making strategic decisions to maximize the value and performance of assets over their lifecycle. In finance, it refers to managing investments on behalf of individuals or institutions to optimize returns while managing risks.

Asset management involves managing and investing large sums of money on behalf of clients to achieve returns over the long term,



- Clients are typically large institutions with substantial funds, such as:

1  
Pension funds

3  
Sovereign  
wealth funds

2  
Insurance  
companies

4  
Charities



# Roles within Asset Management:

**01**

Distribution: Sales, marketing,  
and relationship management

**02**

Investment: Portfolio  
managers, traders,  
and research analysts

**03**

Support:  
Compliance, legal,  
HR, and finance

# • Asset Classes:

These are the segments of the financial markets where investments are made. The main asset classes include:



**FIXED INCOME**



**EQUITIES**



**ALTERNATIVES**



**MULTI-ASSET**

