

Portfolio Balancing

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This project investigated technology and innovation portfolio balancing practices currently being used in companies in a range of industries.

Aims

1. To identify parameters commonly used for balance
2. To identify methods of managing dependencies
3. To identify methods for visualising the portfolios

Progress

The project took place over a 6 week period and started with a literature review of portfolio balancing methods.

It was found that there is limited literature on portfolio balancing specifically, which is often restricted to a paragraph or chapter in wider portfolio management literature. To determine the methods currently in practice, a variety of manufacturing firms and consultants were interviewed. Using the literature review and conversations with companies and consultants, a conceptual framework was created as a basis for developing a portfolio selection and balancing process.

Deliverables

The project report details the information gathered from the literature review and interviews. A conceptual framework for portfolio selection and balancing was developed.

