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# Technology assessment for portfolio managers

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### Abstract

In 2008 the CFA Institute, a global association of investment professionals, added a new topic to its Professional Development Program: “How to judge the technological strength and potential of companies” This offering reflects the growing importance of technological considerations in investment decisions. The offering is rooted in a comprehensive procedure for a technology due diligence exercise. The procedure relies on the recent advances in the management of technology (MOT), and particularly on the *functionality grid*, a key construct in the theory of technology. The procedure is summarized in a one-page *Technology Assessment Template* that allows portfolio managers to perform a quick individual assessment. This article describes the *Template* and offers brief guidelines as to its use.



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## Keywords

Technology; Assessment; Portfolio; Manager; Functionality; Grid

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