



# IM014: Masterclass in Investment Management: Property, Stock, Financial & Funds

## Training Description:

Investment management involves a broad spectrum of responsibilities revolving around the management of financial assets, and not just buying or selling them. Other complex aspects of this field relate to devising strategies to acquire and dispose of assets from time to time, to manage risks and prevent business loss.

Detailed analyses are conducted to reach fruitful conclusions regarding financial next steps and investments. Banking, budgeting and tax-saving are important elements of this field of financial planning and management.

Formal training is thus required to help professionals acquire adequate knowledge and understanding of all aspects of investment management, covering property, stocks, pension funds, etc.

This intensive training course will empower you with complete knowledge and information of several areas of investment management. Through this course, you will receive adequate exposure and experience in investment management, thereby making your skill dynamic and specialised to handle multiple portfolios successfully.

This will garner greater attention of senior members in your organisation and would result in greater opportunities and offerings for higher roles and responsibilities.

## Training Objectives:

**By the end of the training, participants will be able to learn:**

- ✓ An in-depth understanding of all critical aspects of investment management, including property, stock, pension funds, etc.
- ✓ The required knowledge to adopt a dynamic approach to work, capable of successfully undertaking multiple roles within one's organisation, aiding career progression
- ✓ The required multitasking skills to work on multiple areas at one time and successfully deliver what is expected from these
- ✓ The necessary confidence and knowledge to train other professionals on important aspects of investment management
- ✓ The ability to review available information and draw important conclusions, effectively identifying risks and devising strategies to mitigate these
- ✓ Credibility for one's ability to contribute to organisational growth and development, while effectively managing risks for the organisation
- ✓ The ability and knowledge to stay updated with market trends and changing industry demands so as to sustain competition
- ✓ The awareness and experience to ensure that organisational processes and policies are in line with required standards and benchmarks, protecting the organisation and clients against unnecessary allegations and claims
- ✓ The ability to work with advanced technology for expediting analyses to reach accurate decisions
- ✓ The overall skill set and capabilities to work in any role across any organisation in the industry, thus extending one's progress to beyond one's current organisation

## Training Designed for:

This training course is intended for the following professionals:

- Executives and managers handling various aspects of investment management in firms
- Top management of organisations who should understand all aspects of investment management well to take accurate decisions
- Existing investment analysts wishing to increase their knowledge in other areas of investment management
- Pension fund managers and trustees handling pension funds and schemes across organisations
- Compliance staff of organisations responsible for ensuring adherence to required benchmarks and standards
- Any other professional interested in studying investment management in detail

## Training Requirement:

“Hand’s on practical sessions, equipment and software will be applied during the course if required and as per the client’s request.”

Contents can be adapted to your specific wishes. It is therefore possible to focus on specific modules of the training course as per client’s learning needs and objectives. Further, it should be forwarded to us a month prior to the course dates.

## Training Program:

### FIVE DAYS:

#### ❖ Module 1 – Factors Influencing Investments by Firms

- Interest rates
- Economic growth
- Confidence
- Inflation
- Productivity of capital
- Availability of finance
- Wage costs
- Depreciation

#### ❖ Module 2: Types of Financial Investments

- Shares
- Bonds
- Treasury bills
- Options
- Annuities
- Certificate of deposit
- Credit default swaps
- Collateralised debt obligations

- ❖ **Module 3: Types of Financial Markets or Exchanges**
  - Stock market
  - Bond market
  - Forex market
  - Derivatives market
  - Money market
  - Commodity market
  - Spot market
  - Real estate market
- ❖ **Module 4: Types of Investment Strategies**
  - Passive and active strategies
  - Growth investing
  - Value investing
  - Income investing
  - Dividend growth investing
  - Contrarian investing
  - Indexing
- ❖ **Module 5: Methods of Property Investment Management**
  - Real estate investments for rent
  - Investment management by real estate investment groups
  - Real estate trading
  - Investment management through real estate investment trusts
- ❖ **Module 6: Types of Companies and Stocks and Their Selection Process**
  - Growth companies
  - Defensive companies
  - Cyclical companies
  - Speculative companies
- ❖ **Module 7: Overview of Global Bond Markets**
  - Description
  - Types
  - Participants
  - Distinction
- ❖ **Module 8: Factors Influencing Pension Plan Investments**
  - Knowledge of plans and schemes
  - Investment tradition
  - Self-incentives (defined benefit versus defined contribution)
  - Legal and regulatory factors
  - Global financial regulation
  - Risk mitigation tools
  - Income growth
  - Unemployment rate

#### ❖ **Module 9: Steps in Investment Performance Measurement**

- Benchmark selection
- Calculation of the portfolio's excess return
- Performance attribution
- Risk analysis
- ❖ Course Conclusion
- ❖ POST-ASSESSMENT and EVALUATION

### Training Methodology:

This interactive training course includes the following training methodologies as a percentage of the total tuition hours:

- 30% Lectures, Concepts, Role Play
- 70% Workshops & Work Presentations, Techniques, Based on Case Studies & Practical Exercises, Gamification, Software & General Discussions
- Pre and Post Test

### Training Certificate(s):

CMCT Internationally recognized certificate(s) will be issued to each participant who completed the course.

### Training Fees:

**TBA As per the course location** - This rate includes participant's manual, hand-outs, buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

*Note: The 5% VAT (Value Added Tax), will be effective starting 01<sup>st</sup> of January 2018 as per the new regulation from the UAE Government. The VAT applies for all quotation both for local and abroad.*

### Training Timings:

#### Daily Timings:

07:45 - 08:00	Morning Coffee / Tea
08:00 - 10:00	First Session
10:00 - 10:20	Recess (Coffee/Tea/Snacks)
10:20 - 12:20	Second Session
12:20 - 13:00	Recess (Prayer Break & Lunch)
13:00 - 14:00	Last Session

#### **For training registrations or in-house enquiries, please contact:**

Aisha Relativo - Training & Career Development Manager

[aisha@cmc-me.com](mailto:aisha@cmc-me.com) / [training@cmc-me.com](mailto:training@cmc-me.com)

Tel.: +971 2 665 3945 or +971 2 643 6653 | Mob.: +971 52 2954615