



IM016: Fundamental of Investment Management and Funding

Training Description:

Investment management is a booming industry responsible for the handling and generation of large quantities of money and for vast numbers of monetary transactions across the globe.

Investment management services include elements of asset and stock selection, financial analysis and continuous monitoring of investments, and implementation of investment plans. As a part of financial services provided, investment management companies are today employing investment or fund managers and staff in great numbers and focusing on generating impressive revenues.

This intensive training course covers a whole host of interesting topics, including: The Financial System and its Elements, Introduction to Market Instruments, Investments and Asset Classes, and Principles in Investing.

The training course will teach you everything you need to know to become an Investment Manager.

Training Objectives:

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

- ✓ Discuss core client groups of the investment management industry
- ✓ Describe the investment management process
- ✓ Detail relevant asset classes for investment
- ✓ Define performance metrics of investment funds
- ✓ Confidently communicate the definition of technical words and phrases found within the investment management industry

Training Designed for:

This training course is intended for investment professionals wishing to gain practical and theoretical knowledge into the field of investment management, Investment analysts, Fund managers, Pension fund managers, Pension fund trustees, Portfolio managers, Asset managers, Investment managers, Private bankers, General fund managers, Sales staff, Operation and compliance staff.

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:

DAY ONE:

❖ Investment Management Fundamentals

In this section the role played by investment managers within the financial markets is covered. The spotlight on clients and their needs allows participants to place the markets in context.

- Introducing the Investment Markets and Investment Fundamentals

- Sources of Investment Return Drivers
- Understanding Investments Statistics
- Investment Performance Measurement
- Economic Impact on the Financial Markets
- What are the financial markets and why do they exist?
- The major players and the role of the investment banks (Investors – Borrowers)
- Key investor clients within financial markets
- Institutional investors (Pension Funds- Insurance Companies – Sovereign Wealth Funds)

DAY TWO:

❖ **Bespoke Investment Management Process**

Solutions offered to key clients and the style of asset management are discussed

- 9 stages in the investment management process
- Client investment objectives
- Active vs. passive investment
- Benchmarks
- Equity Valuation and Stock Selection
- Style Bets in the Markets

DAY THREE:

❖ **Asset Classes for Investment**

Language and jargon of the major asset classes are covered, at a fundamental level.

- Features of equity
- Features of bonds (Government- Corporate)
- Features of foreign exchange
- Introducing the Investment Markets and Investment Fundamentals
- Sources of Investment Return Drivers
- Understanding Investments Statistics
- Investment Performance Measurement
- Economic Impact on the Financial Markets

DAY FOUR:

❖ **Risk and Return**

Clients are buying risk and return from the investment management industry

- Introducing the Investment Markets and Investment Fundamentals
- Sources of Investment Return Drivers
- Understanding Investments Statistics
- Investment Performance Measurement
- Economic Impact on the Financial Markets
- Modern portfolio theory
- Assessing portfolio performance
- Measurement of risk and return (Sharpe ratio- Information ratio)
- Investment products

DAY FIVE:

❖ **Where the Industry is heading: New Trends in Investment Management**

- Are Structured Finance and Engineered Products a new wave Again?
- Hedge Fund Strategies Overview
- The Other Alternative Assets – The Commodity Markets

- Real Estate and Real Assets
- Private Equity
- Obtaining Alternative Investment
- The Major Trends in the Investment Management Industry
- ❖ 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 01st 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:

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