

How To Make Sense Of Returns, Risk, Diversification And Other Core Concepts Of Investing

SIDC CPE -
Approved
10 Points

Course Delivery:
Asynchronous e-Learning
[ONLINE]

Course Duration:
3 hours

Course Level:
Intermediate

Contact Us

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Training Methodology

This course is structured in a modules of short lectures followed with short case examples, practical mini-case studies and quizzes which will help reinforce the learning concepts and outcomes; and gain deeper understanding of the concepts being taught.

Course Requirements

Participants are not required to have specific prior experience of any of the subject areas. More experienced individuals will be able to build on their knowledge through practical, current case studies.

Course Overview & Objectives

For many, investment is a subject that is mysterious and quite intimidating. This unfortunate outcome is no coincidence. Many in finance like to speak in a different language. The language is intimidating to outsiders. But if you want to progress in your career, you'll need to engage deeply in investment lingo—it is the language of business, the lifeblood of the economy, and increasingly a dominant force in capitalism. So neglecting the language used in investing and hoping to survive in the industry is increasingly difficult as the client becomes more sophisticated.

This course aims to provide you with the most central foundation of investing so that you will never find finance intimidating again. Mastering these six numbers won't make you a financial engineer—there are likely more than enough of those. Instead, internalizing these six concepts will provide the foundation for addressing financial issues with confidence and gain trust with your client.

Through these six concepts, this workshop provides the foundation towards understanding the financial markets

This short course will help participants ask the right questions to guide them in their investment decisions. It is not a blueprint for beating the market but a common sense approach for understanding the conceptual basics of investing.

Course Outline:

The six concepts that will be covered include:

- Return
- Risk
- Diversification
- Valuation
- Leverage
- Expense

Target Audience

This program is suitable for those with some background in understanding investment including:

- ✓ Bankers
- ✓ Institutional Investors
- ✓ Investments Advisers
- ✓ Finance Professionals
- ✓ Remisiers
- ✓ Dealers Representatives
- ✓ Others

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Speaker:

Puah Soon Lim, CFA

Associate Director of an
Independent Financial Advisor

Trainer's Profile

Puah Soon Lim graduated from National University of Singapore with a bachelor's degree in business administration. He is also a CFA Charter holder.

Soon Lim has more than 20 years of experience in the financial and investment industries, spanning from money broking, merchant banking, bond sales and trading, investment planning and management of a wealth management team. His last decade was spent in a stock broking firm's wealth management unit.

He is currently the Associate Director of an Independent Financial Advisor. He works with both individual and institutional investors to provide customised advice on optimal asset allocation. His extensive experience and thorough knowledge in wealth management enables him to break down difficult concepts into easy-to-understand components.

Course Outline

1. The Concept of Return

- I. The concept of risk-free return
- II. The concept of risk premium
- III. Return mathematics
- IV. The mathematics of loss
- V. The tyranny of past return

2. The Concept of Measuring Risk

- I. Volatility as a risk measure
- II. The mismeasurement of risk
- III. Hidden risk
- IV. Value at Risk
- V. Return and risk ratio

3. The Concept of Diversification

- I. The non-intuitive nature of asset allocation
- II. The concept of correlation
- III. The case of negative return asset classes
- IV. The numbers for correlation

4. The Concept of Valuation

- I. The concept of hurdle rate
- II. Intrinsic valuation
- III. Relative valuation
- IV. Asset-based valuation
- V. Sum of the parts valuation

5. The Concept of Leverage

- I. The case for using leverage
- II. Common leverage ratio
- III. Leverage number used in macro analysis
- IV. Understanding the carry trade

6. The Concept of Expense

- I. Case studies on investment cost's impact on investment return
- II. Types of investment cost
- III. The impact of investment cost

7. Post Assessment

- ❖ Online assessment with multiple choice questions

Key Learning Outcomes

After completing the course, participants should be able to:

1. Evaluate the risk and return of an investment objectively
2. Distinguish among the different methods of measuring risk
3. Compute the numbers used for measuring risk and return
4. Identify the various approaches used for valuation
5. Recognize the role that uncorrelated asset classes played in providing enhanced return and diversification
6. Relate how investment expenses affect return of an investment

Categories	Fee [Per Pax]	Remarks
Public	RM450	Individual

Name (Mr/Mrs/Ms/Dr)*: _____ NRIC*: _____

Participant's Email*: _____ Participant's Mobile number*: _____

CMSRL OR ERP Number*: _____ Designation*: _____

Company's Name*: _____

Mailing Address: _____

City: _____ State: _____

Postal : _____ Require CPE Credits (please circle)* : YES / NO Asterisk (*) – Compulsory

Where / How did you first know about our workshops? (You may tick more than one option below)

- ☐ SIDC website
 ☐ A.B. Maximus EDM
 ☐ A.B. Maximus Website
 ☐ HR / L&D Departments
- ☐ Past Delegates
 ☐ Others, please specify _____

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Payment and Refund Policy:

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2. 50% refund of programme fee if notice is given between **1-2 weeks** before commencement. No refund if notice is given less than **1 week** before commencement, or after commencement of the workshop/course.
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5. Delegates without prior payment or Letter of Undertaking (LOU) received from delegates' company will not be allow to enter the workshop venue or be provided with the access to the Online Course.
6. Delegates who cannot attend the workshop/course due to medical or any urgent matters are still liable to the full payment. Replacement from the same company is allowed, provided HR/L&D informed AB Maximus in writing with minimum of **5 Working Days** prior to the commencement of the workshop/course.
7. Last minute or late registration delegates will have to pay the full Standard Fees. Acceptance of last minute or late registration delegates will be at the sole discretion of AB Maximus and subject to availability of seats.

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Please email registration form(s) to andrew.jong@abmaximus.com