

Practical Portfolio Construction & Strategies



About this Programme

Investment should not be just a buy low sell high process or simply chasing for more money. A proper investment process should include setting clear investment objectives and including different instruments and strategies to achieve these objectives.

This programme will empower participants with the necessary knowledge, skillset and framework to design a financial blueprint to achieve investment objectives based on different profiles.

Portfolio strategies will be the main investment concept in this programme. The key principle of portfolio strategies is accumulation or regular investing into investment instruments. The intention is to buy regularly and hold the instrument for long investment timeframe, eventually accumulating a portfolio of different assets with the capability of long-term capital appreciation and / or providing regular dividends.

IBF Financial Training Scheme (IBF-FTS)

This programme has been accredited under the IBF-FTS, and is eligible for funding under the IBF Financial Training Scheme (IBF-FTS), subject to all eligibility criteria being met.

IBF-FTS provides up to 90% funding for direct training costs, subject to a cap of S\$2,000 per candidate per programme, for all Singaporeans and Singapore PRs who are physically based in Singapore.

IBF full set of terms and conditions can be found via <https://www.ibf.org.sg/programmes/Pages/IBF-FTS.aspx>

About A.B. Maximus & Co.

Maximise your potential in finance and investment with us! We are a trusted and reliable financial education company that provides guidance at every step of your financial career, through high quality programs across Asia that enhance your employability.

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LEARNING OUTCOMES AND OUTLINE

- Derive Investment Objective both in absolute number and required percentage return. This is based on the concept of financial freedom which calculates how much is required such that the passive income from investment can cover expected expenses.
- Choose from different asset classes to achieve the Investment Objective.
- Describe fixed income instruments and overview of the bond market and compare these with instruments offered by insurance companies such as Endowments and Annuities.
- Review information about bonds, compare and select the most suitable issue via case studies and open platforms.
- Outline an overview of the stock selection criteria, comprising of Business, Financial Statement and Pricing Analysis.
- Apply a step-by-step process which could be conducted on a regular basis to sift out potential stocks for investment.
- Explain an Exchange Traded Fund (ETF) and Unit Trust, their benefits and risks.
- Construct a regular investment process to eventually build up an ETFs / Funds Portfolio.
- Explain a Real Estate Investment Trust (REIT) and overview of the REITs market.
- Apply a step-by-step framework in accumulating REITs on a regular basis and eventually own a REITs portfolio with a steady dividend stream.

COURSE OUTLINE

1. Setting up an Investment Plan
 - Setting Investment Objectives
 - Required Returns Calculations
 - Portfolio Allocation
2. Selecting Fixed Income Instruments
 - Bonds
 - Endowments and Annuities
 - Hands-on Selection Exercise
3. Selecting Stocks via a Systematic Process
 - Business Analysis
 - Financial Statement Analysis
 - Pricing Analysis
 - Step by Step Selection Process
4. Constructing a Portfolio using Exchange Traded Funds and Unit Trusts
 - ETFs
 - Unit Trusts
 - Theme Selection
5. Creating a Real Estate Investment Trust Portfolio for Regular Income
 - Overview of REITs market
 - Yield Comparison
 - Property Review
 - Credit Risk Analysis

Included in this programme:

10.5 hours of Live Classes (via Zoom); Course Materials & PowerPoint Notes

Full programme fee - before funding

S\$680 (inclusive of GST)