

Applied Discounted Cashflow Valuations on US Stocks and Options Investing

Course Date:8th NOV 2023 | WED**Course Time:**

9:00am – 5:00pm

Course Venue:

Concorde Hotel, KL

Course Level:

Intermediate



SIDC CPE -
Approved
10 Points

Workshop Overview & Objectives

This course will illustrate how a Practitioner performs Discounted Cash Flow on US stocks to derive fair value of the company. The trainer will then explain how he uses this valuation technique to enhance his investment decisions in stocks and options investing. The objective of this course is to demonstrate how finance theories are applied in practice by different practitioners in real-world situations.

Workshop Requirements

The workshop will be conducted in English and to participate in this workshop, you need to have a basic understanding of Discounted Cash Flow (DCF) and its applications.

You also need to bring a laptop with Excel installed and ready to use.

Who Should Attend

This program is suitable for those with some background in Discounted Cash Flow including:

- Corporate Finance Analysts, Investment Analysts
- Portfolio Managers, Private Equity
- Asset Management
- Institutional Investors, Investment Advisors
- Traders, Dealers & Remisiers
- Industry Related Professionals
- Others

Contact Us

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Training Methodology

After the concept of Discounted cash flow is explained, the course will use mainly real-life case studies and hands on exercise for the participants to internalize the learning. The trainer will mainly play a facilitation role to share his experience on how discounted cash flow has empowered him to make better decisions, and at the same time, facilitate discussion from the audience to generate ideas for better techniques in stocks and options investing.

AB MAXIMUS
Capital Markets Training

Instructor-LED



Speaker:

Chua I-MIN, CFA

Lead Instructor for Investor Education

Trainer's Profile

Mr. Chua I-Min, CFA is the Lead Instructor for Investor Education with A.B. Maximus & Co. Pte. Ltd. He conducts regular classes for SGX Academy in fundamental analysis, stock valuation, REITs and property stocks investments. His flagship program titled "Create a Secondary Income Stream through Long Term Share Investing" has been well received by retail investors. A book with the same title has been written to reach out to a wider audience.

I-Min graduated with a Bachelor's Degree in Business Administration with Honours (2nd Upper), majoring in Finance. He continued his education by earning the CFA charter, a well sought after professional designation in the global investment industry. Even as a student, I-Min has been applying concepts from text books in the real-world shares market. He has since honed his investment skills with more than 20 years of share investing experiences.

Professionally, I-Min has more than 20 years of working experience mainly in the investment industry. He was the Chief Operating Officer for A.B. Maximus before his current role. Previously as a real estate investment professional in Capitaland and subsequently PhillipCapital, he had collectively done investment deals amounting to S\$250 million. Prior to that, he was based in China, participating in a successful IPO exercise of a Chinese company listed on the Singapore Exchange.

Workshop Outline

1. Introduction of Fair Value Concept

- Using the concept of intrinsic value to determine whether a security is under/over/fair value

2. Explanation of the Discounted Cashflow Technique

- Overall concept of Discounted Cashflow
- Free Cashflow Calculation
- Deriving the Discount Factor – CAPM model
- Determining the Growth Rate
- Determining the Terminal Value

3. Hands on Exercise to value a company with Discounted Cashflow

- Using the Excel model / template to calculate the fair value of a real-life company

4. Discussion on using the fair value derived to make investment decisions

- Buy / Sell decisions
- Stock Selection

5. Explanation of Option Strategies

- Buy Call
- Buy Put
- Sell Call
- Sell Put
- Payoff Diagram

6. Case studies of Options Strategies application with fair value from Discounted Cashflow

- Determine the right strike price for the various Option strategies
- Discussion with real life examples

Key Learning Outcomes

After completing the workshop, participants should be able to:

- Relate the logic and rationale behind Discounted Cashflow technique in valuing a company from a practical viewpoint
- Recognize the different basic options investing methodologies and how they help to expand the range of investment strategies
- Apply Discounted Cashflow technique to derive fair value of companies. Participants will be given an excel model / template to empower them to carry out the exercise efficiently
- Perform Discounted Cashflow technique to enhance the performance of Options Investing
- Determine on buy / sell calls and stock selection with the fair values derived from Discounted Cashflow. Real life case studies will be used to illustrate the decision process

Registration Form: Applied Discounted Cashflow Valuations on US Stocks and Options Investing

Categories	Early Bird Fees (Per Pax) (Register by 18 th Oct 2023)	Standard Fees (Per Pax)	Remarks
Public (Individual)	<input type="checkbox"/> MYR 1500 net	<input type="checkbox"/> MYR 1700 net	Fees inclusive of training materials, lunch and tea breaks.

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 _____

Payment Mode :

Full Payment of MYR _____ (Grand Total)

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Cheque : (made payable to "AB Maximus")

Deposit cheque in Malaysian Banks **ONLY**. Please scan and email the bank-in slip as proof of payment after deposit.

Bank Transfer : Please provide payment advice as proof of payment.

Payment and Refund Policy:

Any notice of withdrawal must be given in writing via mail/email:

1. Full refund, less 10% bank admin and admin charges, if notice is given at **least 2 weeks** before commencement.
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.
3. AB Maximus reserves the right to reject applications that are not in compliance with the terms and conditions for this course. Delegates with a different name from the registered name will not be allowed to enter the workshop venue.
4. No replacement of delegates once the workshop/course commences. Delegates who leave early will NOT be given the SIDC CPE points.
5. Delegates without prior payment or Letter of Undertaking (LOU) received from delegates' company will not be allowed 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.

I understand and agree to the terms and condition stipulated above

Signature: _____ Date: _____

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