

How to make sense of

Returns, Risk, Diversification and Other Core Concepts of Investing



DELIVERY MODE

Asynchronous e-Learning



COURSE LEVEL

Intermediate



TRAINING TIME

3 Hours



CPE POINTS EARNED

10 CPE Points

Get in Touch

A.B. MAXIMUS
7 Temasek Boulevard, #12-07, Suntec Tower One, Singapore 038987
Andrew Jong | andrew.jong@abmaximus.com

Brochure,
Registration &
Other Courses



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 REQUIREMENTS & METHODOLOGY

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.

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

WHO SHOULD ATTEND?

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

BANKERS | INSTITUTIONAL INVESTORS | INVESTMENTS ADVISERS | FINANCE PROFESSIONALS | REMISIERS | DEALERS REPRESENTATIVES | OTHERS

LEARNING OUTCOMES

After completing the course, participants should be able to:

- I. Evaluate the risk and return of an investment objectively
- II. Distinguish among the different method of measuring risk
- III. Compute the numbers used for measuring risk and return
- IV. Identify the various approaches used for valuation
- V. Recognize the role that uncorrelated asset classes played in providing enhanced return and diversification
- VI. Relate how investment expenses affect return of an investment

PUAH SOON LIM, CFA

Associate Director of an Independent Financial Advisor



Background:

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

Categories	Standard Fees (Per Pax)	Remarks
Public	MYR 450.00 net	The course fee is nett, with no additional taxes or charges applied.

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)

☐ 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. 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 join the online course.
4. No replacement of delegates once the workshop/course commences. Delegates who leave early or didn't complete the eLearning course 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 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.

I understand and agree to the terms and condition stipulated above

Signature: _____ Date: _____

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