

AB MAXIMUS

Capital Markets Training

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Be Your Own Portfolio Manager

3 CPD HOURS

Programme Code: P180124ZCC

Course Overview & Outline

After attending this short course, participants will be able to:

- Describe the tops-down and bottoms-up approach
- Interpret the business cycle and economic indicators
- Identify the assets and securities appropriate for a client
- Demonstrate the ability to create a custom-made portfolio for a client
- Explain the process of portfolio optimization
- Calculate and interpret the Sharpe ratio, Treynor measure and maximum drawdown
- Explain the process of performance attribution
- Identify effective communications channels to a client
- Demonstrate the ability to make portfolio recommendations to a client
- Demonstrate the ability to create a portfolio proposal for a client
- Local/regional case studies will be discussed in the course.

Course Methodology

- Class-based presentation
- Interactive Q&A session

Who Should Attend

- Individuals from the Finance Industry
- Trading Representatives
- Remisiers



IBF-FTS Funding

This programme is recognised under the Financial Training Scheme (FTS) and is eligible for FTS claims subject to all eligibility criteria being met. For more information please visit [IBF Website](#).

Please note that in no way does this represent an endorsement of the quality of the training provider and programme. Participants are advised to assess the suitability of the programme and its relevance to participants' business activities or job roles.

The FTS is available to eligible entities based on the prevalent funding eligibility, quantum and caps. FTS claims may only be made for recognised programmes with specified validity period.

Speaker's Profile



Benjamin Goh, CFA is currently a Senior Lecturer at the Singapore Institute of Technology, Singapore's fifth autonomous university. While waiting (impatiently) to start on his PhD, Ben teaches a variety of finance courses. Before joining SIT, Ben held a number of diverse roles in CIMB Group, JPMorgan, Credit Suisse, Deloitte Consulting and Hewlett Packard.

His most recent role was as Market Strategist for CIMB Research where Ben provided analysis and insight on market moving events, the global macroeconomic environment, assets and individual securities. Before that, Ben was a fund manager with CIMB's Discretionary Investment Unit.

Ben has been interviewed on Channel NewsAsia's First Look Asia, Business Times and provided market commentary on 938 Live every week from Monday to Thursday.

An adjunct instructor for CFA preparatory classes, Ben's specialty is equity analysis, portfolio management and economics. Ben also sits on Nanyang Polytechnic's finance industry panel where he advises the school on structuring finance courses to meet industry needs.

Benjamin received his Masters in Finance from the ICMA Centre, United Kingdom, in 2002 and became a Chartered Financial Analyst in 2001.

Register your interest today!

For in-house training request, please contact Alson at alson@abmaximus.com.
Competitive corporate discounts available for bulk registration.

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the other courses available.