



ETF Investment Strategies

Course Duration: 3 hours

Course Overview and Outline

ETFs are the fastest growing; investment innovation in the recent decade. We can better manage our wealth by constructing an ETF-based portfolio for a variety of risk appetites or market environment.

Course participants will learn about:

- The evolution of ETF landscape: From market capitalization to Fundamental weighting
- Key advantages of using ETFs
- ETF investment strategies: Value, Sector, Volatility, Alternatives, Leverage & Inverse ETFs
- Constructing ETF-based investment portfolios to achieve your financial goals
- Leveraging on the range of ETF products available to improve your trading outcomes
- Summary of best practices

Who Should Attend

- Individuals from the Finance Industry
- Remisiers
- Trading Representatives
- Investment Advisors

Course Methodology

- Class-based presentation
- Interactive Q&A session

Speaker's Profile



Tolmas Wong, CFA is working currently as Director & Head of Private Clients Services team at CIMB-GK Securities. The team provides research-based advisory services on the regional equity markets & other financial products to corporate, trusts & HNI clients. He started his career at UOB & subsequently became the fund manager of UIS, a listed closed-end fund of UOB group.

He also participated as a volunteer in various professional & academic bodies in S'pore to promote financial education in the industry. He is currently serving as a Board member of CFA Singapore (an affiliate of CFA Institute) & an Executive Committee member at the Asian Securities Analysts Federation (ASAF). He is also lecturing part time for the CFA revision program, SHRI's Diploma for Investment program & various continued education courses in investments for the Institute for Banking & Finance & the Society of Remisiers

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