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Course: Investment Management

Code	City	hotel	Start	End	price	Hours
178	Zurich (Switzerland)	Hotel Meeting Room	2025-03-24	2025-03-28	5450 €	25

Introduction

Never before have financial issues been so often been the headline news. It is therefore crucial that today's business professionals expand their financial knowledge to allow them to contribute to daily decisions and debates.

This course is designed specifically for non-financial personnel; this intensive seminar educates and informs delegates of the key financial markets/products/risks and hazards.

Objectives

The seminar provides delegates with the tools required to find better answers to questions such as:

- What are the major market indices and how are they linked?
- What is meant by a dual listing?
- How is a forward rate determined?
- Can I profit from interest differentials?
- What is the role of correlation in reducing risk?
- How do I judge whether my performance in the market is good or bad?
- What are futures and options?
- How can futures and options be used to protect the value of my portfolio?
- What is meant by spread trading?
- What are the role of bonds in a portfolio.
- The difference between fundamental and technical analysis.



Training Methodology

Using a combination of lectures and individual exercises with practical applications, the delegates will gain both a theoretical and practical knowledge of the topics covered. The emphasis is on the “real world” and as a result delegates will return to the workplace with both the ability and the confidence to apply the techniques learned.

Organisational Impact

This seminar provides an integrated blending of concept and practical application. As well as developing subject knowledge delegates will return with enhanced quantitative and technical skills. Advanced Excel skills are increasingly a pre-requisite for financial analysis. Delegates will return to the organisation with great exposure to the power of Excel.

Personal Impact

Delegates will acquire detailed knowledge about the trading, pricing and risk management associated with a variety of financial products. The practical and real world approach will provide delegates with a “tool-box” to bring back to the organisation to assist in the analysis of financing, treasury and risk management decisions

SEMINAR OUTLINE

An Introduction to the Financial Markets

An Introduction to the Equity Markets:

- IPO's



- Market Indices
- International Equity Market Links
- Dual Listings
- GDR's and ADR's

An Introduction to Bond Markets

- Long Term versus Short Term
- Treasury versus Corporate
- Types of Bond

An Introduction to the FX Market

- The spot and forward market
- Exchange Rate trends and linkages
- Carry Trades

An Introduction to Portfolio Theory

- The link between risk and return.
- The role of correlation
- The Markowitz model of Portfolio Risk
- The benefits of diversification
- The Capital Asset Pricing Model
- Benchmarking

Derivatives Use in Investment Management

An Introduction to the Derivatives Market

- Futures
- Options



The Cost of Carry Model

- Cash and carry arbitrage
- Reverse cash and carry arbitrage

Using Options to provide portfolio insurance

Using Futures to provide portfolio insurance

Using futures to change a portfolios "beta"

Spread trading:

- Intra-commodity spreads
- Intra-commodity spreads

Option trading strategies.

Bond Portfolio Management

- Bond pricing
- Bond Duration
- Term structure of interest rates
- The convexity of a bond
- Bond ratings
- Immunising a bond portfolio
- Structured products
- Money Market Deposits/CD's/Commercial Paper/Treasury Bills

Fundamental and Technical Analysis

- Technical versus fundamental analysis
- Yields and ratios



- Valuation
- Chartism
- Technical Trading Rules



The Scandinavian Academy for Training and Development employs modern methods in training and skills development, enhancing the efficiency of human resource development. We follow these practices:

- **Theoretical Lectures:**

- We deliver knowledge through advanced presentations such as PowerPoint and visual materials, including videos and short films.

- **Scientific Assessment:**

- We evaluate trainees skills before and after the course to ensure their progress.

- **Brainstorming and Interaction:**

- We encourage active participation through brainstorming sessions and applying concepts through role play.

- **Practical Cases:**

- We provide practical cases that align with the scientific content and the participants specific needs.

- **Examinations:**

- Tests are conducted at the end of the program to assess knowledge retention.

- **Educational Materials:**

- We provide both printed and digital scientific and practical materials to participants.

- **Attendance and Final Result Reports:**

- We prepare detailed attendance reports for participants and offer a comprehensive program evaluation.

- **Professionals and Experts:**

- The programs scientific content is prepared by the best professors and trainers in various fields.

- **Professional Completion Certificate:**

- Participants receive a professional completion certificate issued by the Scandinavian Academy for Training and Development in the Kingdom of Sweden, with the option for international authentication.

- **Program Timings:**

- Training programs are held from 10:00 AM to 2:00 PM and include coffee break sessions during lectures.