

# Investment Themes – 2018 And Beyond

10 October 2018

**Symphony Digest**

Centre for Knowledge and Financial Mastery

7 AICB  
CPD Hours

10 SIDC  
CPE Points

HRDF SBL  
Claimable

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Thematic investing is a strategy to identify economic and social changes which set the focus of investing. Example is the consumption boom in the US by baby boomers which brought an exponential demand growth for consumer goods and services, automobiles and homes. Identifying the right theme will lead to better investment decisions. This training will touch on the investment themes in 2018 and beyond, the challengers and risk of thematic investing.

## Who Should Attend?

- ✓ Corporate and Commercial Bankers
- ✓ Investment Bankers
- ✓ Fund Managers
- ✓ Corporate Advisors
- ✓ Research Analysts
- ✓ Accountants
- ✓ Finance Managers
- ✓ Financial Services Professionals

## Course Outline

### Thematic Investing

- Discuss and explain the benefits of this investment strategy
- Identify past investment themes

### Investment Themes in 2018 & Beyond

- **Consumption trends – Identify and explain the following**
  - Millennials' consumer behaviour
  - Sharing economy
  - Gender gap
  - Baby boomers' consumer behaviour
  - Urbanization
- **Technological trends – Identify and explain the following**
  - Genetic Revolution
  - Artificial Intelligence
  - Customer Intelligence and Big Data
  - Cloud Based CRM System and Analytics
  - Internet of Things
- **Company's Strategy & Culture – Identify the right companies to invest in**
  - Companies that embraces Industry 4.0
  - Companies that focus on their competitive advantage
  - Company's ability to adapt to cultural changes
- **Investors' Trends – Identify and explain the following**
  - Millennials' investment preference
  - Private Equity
  - Environmental, Social and Corporate Governance Investing
  - Baby boomers' investment preference
- **Economic Trends – Explain the following**
  - Trade War
  - The US Federal Reserve and Global Central Bank's Balance Sheet
  - Debt Service Ratio
  - Inflation
  - Chinese Developers' Cost for refinancing
- **The Risks of Investing Based on themes**
  - Herding
  - Over-confidence
  - Confirmation Bias

## Trainer's Profile

The trainer is a graduate of the Institute of Chartered Secretaries and Administrators (CSA) and holds a Commonwealth Executive Master of Business Administration (MBA) from Wawasan Open University.

He is currently a Director with a Regional Asset Management Company and has more than 21 years of experience in financial industry within consumer banking and asset management business. He has spoken at many large investments throughout Malaysia.

He has vast experience in the financial industry with key focus on sales and marketing. He has extensive experience in the financial markets and has been a speaker on the financial circuit in Malaysia for more than 15 years, He has conducted numerous sales, motivational and product training over the years in the financial industry. His presentation and training style is simple, lively, engaging and easy to understand and is very effective in sending the message across to his audience.

### Upcoming Training

**Build Million Asset Portfolio with REITs**  
(25 October 2018)

**Insider Trading**  
(14 November 2018)

## Investment Themes – 2018 And Beyond (10 October 2018)

Name:

Name:

Designation:

Designation:

Department:

Department:

Company:

Company:

Address:

Address:

Tel:

Tel:

Fax:

Fax:

Email:

Email:

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### Contact for administrative matters if different from above

Name:

Department:

Tel:

Fax:

Email:

**Date: 10 October 2018**

**Workshop duration and time: 1 day, 9.00 am to 5.00 pm**

**Venue: Hotel Istana Kuala Lumpur City Centre, 73, Jalan Raja Chulan, 50200 Kuala Lumpur, Malaysia**

**Course fee** (inclusive of course materials, lunch and 2 tea breaks):

For registration before and on 26 September 2018: **RM1,000**

For registration after 26 September 2018: **RM1,200**

**(Does not include GST or SST)**

**Registration is confirmed upon receipt of payment, unless otherwise notified.**

### Payment Options

Cheque Bank \_\_\_\_\_ Cheque No. \_\_\_\_\_ Amount RM \_\_\_\_\_  
Payable to **Symphony Digest Sdn. Bhd.**

*\*Please write company name and programme at the back of the cheque and mail to 69-3, Block F, Zenith Corporate Park, Kelana Jaya, 47301 Petaling Jaya, Selangor.*

Bank Transfer

Account holder: Symphony Digest Sdn. Bhd.

Bank: Hong Leong Berhad A/C No.: **29100043872**

*\*Please e-mail or fax (03-7806 2800) us the bank-in slip / transfer confirmation together with the completed registration form.*

*Note: For cancellations less than 14 days before event or non-arrival on the training day, no refund will be given. Substitution is allowed. Should the number of participants be too low to make the course a meaningful learning experience, Symphony reserves the right to postpone or cancel the course.*