

Investment for Beginners

25 January 2018

Symphony Digest

Centre for Knowledge and Financial Mastery

**10 SIDC
CPE Points**

**HRDF SBL
Claimable**

Symphony Digest

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You probably have heard that the return from your bank savings accounts will not be sufficient to cover the inflation over a long period of time. The solution is to start investing your money! However, investing can be pretty intimidating if you are just getting started.

Our course does not spit out terminology and facts at you. Instead, we give you important tips to keep in mind while investing. We will guide you from account opening to investment analysis so that you will be an educated investor. We strongly encourage you to attend this course if you are a beginner in investing.

Who Should Attend?

- ✓ Personal Sales Consultants
- ✓ Wealth Management Consultants
- ✓ Investors
- ✓ Executives
- ✓ CMSR Licence holders

Course Outline

Basic of Investments

- Reasons to invest
- Compounding rate of interest and inflation
- Different types of investment products
- Expected return and risk in Investment
- Diversification

Investment in Equity

- How to get started
- Type of accounts
- Selection of broker
- Fees and Charges
- Settlement
- Margin financing
- Understand the market pricing and the bid-ask spread
- Investment decision using fundamental analysis
- Investment decision using technical analysis
- Cash position management

Investment in Loan Stock, Warrant, and Call Warrant

- Differences of Loan Stock, Warrant and Call Warrant
- Calculation of Intrinsic Value for Loan Stock, Warrant and Call Warrant
- Additional risk factors when investing in Loan Stock, Warrant and Call Warrant

Investing in funds (Unit Trust and Exchanged Traded Funds)

- Differences between Unit Trust and Exchange Traded Funds
- Advantages of fund investment
- Risks in fund investment

Conclusion

- Comparison of historical performances of various investment products
- Online resources available
- Future of investing with Fintech

Trainer's Profile

With over 25 years of experience in the financial sector, the trainer is a seasoned financial advisor who started his career as an auditor with Ernst & Young in Washington, D.C. where he was a member in both the financial audit and computer audit teams. He joined the investment industry as an equity dealer upon his return to Kuala Lumpur in the early 1990s.

In 2003, he was appointed as a mentor by Bank Simpanan Nasional for its Micro Credit program. In 2007, he was appointed by the Health Minister to the Board of Visitors of Hospital Kuala Lumpur.

He has also contributed greatly to the financial literacy education in the country where he has been providing financial seminars specifically in the area of accounting, finance and investment since 2008. He has conducted many classes as a guest lecturer at various local colleges and universities throughout the country. In addition, he conducts corporate training and preparatory classes for ACCA examination and Real Estate License examination.

He had his higher education in the United States, where he graduated with a Bachelor of Science in Accounting from University of Louisiana and Masters of Science in Accounting from University of Delaware. He is also a Certified Public Accountant in the state of California, U.S.A.

**Upcoming Training
(10 SIDC CPE Points)**

Cash Flow Modelling
(6 & 7 January 2018)

**Panic, Freefall, and Meltdown – The What
and Why of Financial Crisis**
(1 March 2018)

**BNM Shariah Parameters – Complying with &
Avoiding Penalties**
(6 March 2018)

Investment for Beginners (25 January 2018)

Name:	Name:
Designation:	Designation:
Department:	Department:
Company:	Company:
Address:	Address:
Tel:	Tel:
Fax:	Fax:
Email:	Email:

Contact for administrative matters if different from above

Name:	Department:
Tel:	Fax:
Email:	

Date: 25 January 2018

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

Venue: 69-3, Block F Zenith Corporate Park, Jalan SS7/26 Kelana Jaya, 47301 Petaling Jaya, Selangor

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

For individual registration: **RM500 + 6% GST**

For company registration: **RM750 + 6% GST**

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 (info@symphonydigest.com) 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.