

# GROWING WEALTH WITH REITS AND EQUITIES

Unlock the world of investments with this comprehensive course on Equities and Real Estate Investment Trusts (REITs).

Designed for aspiring investors, this course provides a solid foundation in investment principles, from understanding the historical performance and key characteristics of equities and REITs to mastering critical valuation techniques. Participants will explore the dynamics of risk and reward, discover the power of diversification, and develop the analytical skills needed to make confident, informed investment decisions. Whether you're looking to diversify your portfolio or dive deeper into the financial markets, this course is your essential guide to navigating the world of investments with expertise and insight.

## Learning outcome :

1. Understand the fundamental concepts and historical performance of equities and Real Estate Investment Trusts (REITs).
2. Analyze the risks and rewards of equity investments, including systematic and unique risks, and differentiate equities from other asset classes.
3. Evaluate equity valuation methods such as Price/Earnings ratio, Price/Book ratio, and Dividend Discount Model, demonstrating the ability to interpret relevant data.
4. Explain the role of diversification in investment strategies, including the significance of indirect investments and stock market indices.
5. Assess the characteristics, advantages, and disadvantages of REITs, applying valuation techniques to make informed investment decisions.

## Programme Details:

**Date:** 18 June 2025

**Time:** 9:00 a.m. – 5:00 p.m.

**Venue:** Hotel Concorde, Kuala Lumpur

## Programme Fee:

**Early Bird Fee: RM1,600**

Register before 4 June

**Normal Fee: RM1,750**

(Inclusive SST)



# GROWING WEALTH WITH REITS AND EQUITIES



## Module 1: Introduction

- Overview of equities and REITs
- Historical performance

## Module 2: Equities Investment

- Characteristics of equities
- Concept of risk and reward
- Unique risk of equities investment
- Systematic risk of equities investment
- Differences between equities and other type of asset classes
- Performance measurement for equity investment

## Module 3: Understanding Equities Valuation

- Price/Earnings ratio
- Price/Book ratio
- Dividend yield
- Getting the data

## Module 5: Concept of Diversification

- Indirect investments
- Stock market Indices

## Module 6: Real Estate Investment Trusts (REITs)

- Characteristics of REITs
- Valuation of REITs
- Advantages and disadvantages of REITs

## Module 7: Conclusion

- Summary of Key Points
- Questions and Answers



## TRAINER'S PROFILE

The trainer is an HRDF accredited trainer who conducts investment seminars for Malaysia's leading financial institutions on a regular basis. His areas of expertise include portfolio management, fundamental analysis, technical analysis and market forecasting.

He is also Certified Public Accountant in California, U.S.A, with over 30 years of experience in the financial sector. He began his career as an auditor with Ernst & Young in Washington, D.C. and is currently working as a licensed equity dealer with a major stockbroker in Malaysia.

He obtained his PhD in Finance from Monash University Malaysia. He also has a Master of Science in Accounting from the University of Delaware as well as a Bachelor of Science in Accounting from the University of Louisiana at Lafayette.

## PARTICIPANTS' DETAILS

Name:
Position:
Department:
Contact Number:
Email:

## ADMIN'S DETAILS

Name:
Position:
Department:
Company:
Contact Number:
Email:
Address:
<b>Payment Method:</b> <input type="checkbox"/> Direct Payment <input type="checkbox"/> Claim HRD

## TERMS AND CONDITIONS

1. For cancellation less than 14 days before or non-arrival on the training day, no refund will be given. Substitution is allowed.
2. 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 training.
3. HRDC grant application shall be applied and approved before the training day. Maximum claim from HRDC is RM1,750 per day. The balance, if any, is to be topped up by client.