

GROWING WEALTH WITH REITS AND EQUITIES

10 SIDC CPE POINTS

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

Programme Details:

Date: 12 August 2025

Time: 9:00 a.m. – 5:00 p.m.

Venue: Concorde Hotel, Kuala Lumpur

Programme Fee:

Early Bird Fee: RM1,600

Register before 1 August

Normal Fee: RM1,750 (Including SST)

need information of group registration? Contact us

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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

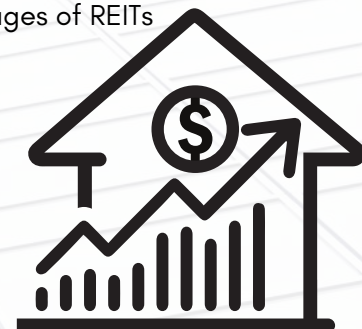
- Indirect investments
- Stock market Indices

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.

PARTICIPANT DETAILS

Name:

Position:

Department:

Contact Number:

Email:

ADMIN DETAILS

Name:

Position:

Department:

Company:

Contact Number:

Email:

Address:

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TERMS AND CONDITIONS

1. Cancellations made less than 14 days before the training date or non-attendance on the day of training are non-refundable. Substitution is allowed.
2. Once registration is confirmed, the client is fully liable for the course fee, regardless of whether payment is made directly or through the HRDC grant, and even if participants do not attend the training.
3. Clients who opt for direct payment must ensure full payment is made before the training date.
4. HRDC grant applications must be submitted and approved before the training day. The maximum claimable amount is RM1,750 per participant per day. Any shortfall between the approved grant and the course fee must be topped up by the client.
5. Should the number of confirmed participants be too low to ensure a meaningful learning experience, Symphony reserves the right to postpone or cancel the training.

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