Programme ID: 10001636764

APPLIED DATA ANALYTICS &

GENERATIVE AI

for Investment Decision-Making

SIDC CPE-APPROVED: 10 CPE POINTS

● **22 April, 9am-5pm**

● **Concorde Hotel, KL**

This one-day, hands-on workshop equips investment professionals with core skills in data analytics and generative AI to drive better, faster, and more data-informed investment decisions.

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Early Bird: RM1,660

Normal Fee: RM1,960
including 8% SST

HRD CORP CLAIMABLE

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Applied Data Analytics & Generative AI for Investment Decision-Making

Module 1: Foundations of Data Analytics & Generative AI in Investment Banking

- Role of data analytics in investment decision-making.
- Introduction to GenAI tools for financial modelling and research automation.
- Malaysian context: data reliability, confidentiality, and responsible AI usage under BNM/SC expectations.
- Use Case: Extract insights from analyst reports or market briefings.
- Use Case: Convert raw economic data into structured summaries.
- Hands-on: Build a "Market Summary Generator."

Module 2: AI-Enhanced Financial Analysis & Investment Research

- How GenAI accelerates the investment research cycle.
- Equity analysis: summarising annual reports, extracting key ratios.
- Fixed income & macro interpretation: yield curve, policy interpretation.
- ESG analysis: converting disclosures into ESG scorecards.
- Hands-on: Create an "AI Equity Analyst Assistant."

Module 3: Data Analytics for Screening & Portfolio Insights

- Apply screening strategies for Malaysian equities.
- Interpret CSV datasets using GenAI.
- Analyse portfolio performance & contributors.
- Hands-on: Build a "Portfolio Summary Assistant."

Module 4: AI-Supported Investment Decision-Making & Scenario Analysis

- Scenario planning using GenAI.
- Stress-test investment ideas using macro assumptions.
- Generate investment committee proposals.
- Hands-on: Build scenario analysis prompts.

Module 5: AI for Advisory Communication & Client-Facing Deliverables

- Draft investment updates tailored to client segments.
- Translate investment notes to English/BM.
- Generate product summaries & suitability explanations.
- Hands-on: Create a "Client Advisory Assistant."

Module 6: Governance, Controls & Deployment of AI Investment Workflows

- Responsible AI usage in regulated environments.
- AI risk checklist: bias, hallucination, privacy.
- Group exercise: Prioritise workflows.

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TRAINER'S PROFILE

The Trainer is the Lead Trainer and Data Science Lead where he designs and delivers interactive corporate training programs in AI, data science, and machine learning. He also spearheads the development of AI-driven frameworks and prototypes, enabling organizations to integrate emerging technologies seamlessly into their operations. With a versatile background across academia, entrepreneurship, and industry, he has previously lectured at UniRazak and served as a vocational trainer at New Era Institute of Vocational and Continuous Education (Kajang). He has also founded and led software development teams in fintech and edtech startups, drawing on his deep expertise in marketing, software engineering, and artificial intelligence to craft impactful, scalable solutions. He brings extensive corporate training experience across sectors such as manufacturing, fintech, and financial services. He has led specialized upskilling programs for manufacturing giants, empowered fintech teams with AI automation and fraud detection tools, and conducted strategic workshops on data and AI adoption for banks and financial institutions. His cross industry exposure also includes roles in robotics and mechatronics engineering within the oil & gas and manufacturing sectors, including at Flextronics. As a consultant and coach, he has helped organizations such as Beyond Insights, Plus Minus Zero, and Watson-Marlow leverage data and AI to drive business transformation.

REGISTRATION DETAILS

PARTICIPANT DETAILS

Name:

Position:

Department:

Contact Number:

Email:

Name:

Position:

Department:

Contact Number:

Email:

ADMIN DETAILS

Name:

Position:

Department:

Company:

Contact Number:

Email:

Address:

Payment Method: ☐ Direct Payment   ☐ Claim HRD

Notes:
- *Cancellations made less than 14 days before the training date or non-attendance on the day of training are non-refundable. Substitution is allowed.*
- *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.*
- *Clients who opt for direct payment must ensure full payment is made before the training date.*
- *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.*
- *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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