

MAKING INVESTMENTS WORK



IBF & SKILLS FUTURE FUNDED COURSE

This course is designed for finance professionals who want to gain a deeper understanding and practical knowledge of investment and trading concepts, developed accordingly to IBF standards.

WHY GET IBF CERTIFIED



Industry Leadership

IBF Standards is a set of internationally-benchmarked competency standards, developed by the industry, for the industry.



Career Progression

Practice-oriented approach to talent, skill development and improve career roadmaps for progression in the finance industry.



Quality Certification

Certification under the IBF Standards is an industry endorsed mark of quality that recognises individuals who exhibits professional excellence, integrity and commitment to the industry.

MIW COURSE OUTLINE

3 FULL DAY COURSE

7 HOURS PER DAY

Day 1

a) Introduction to Equity Investment

b) Fundamental Analysis

c) Assessment

Day 2

a) Technical Analysis

b) Assessment

Day 3

a) Behavioral Finance

b) Complete Equities Investment System

c) Assessment

COURSE DETAILS

Learning Objective

The objective of this course is to equip participants with the professional knowledge of Fundamental and Technical Analysis, coupled with practical skills in devising investment strategies and proper portfolio management techniques, in order to be able to provide quality sales support and financial advice to their customers.

Teaching Methodology

This lesson will be focused on active learning. To achieve this practical process, the trainer will first introduce the theoretical concept of the topic before engaging in practical activities. At the end of each day, every participant will be able to derive their own analysis on their individually chosen investment using the techniques they learn during the day. To confirm their understanding, assessments will be given throughout the day to reinforce their understanding.

MIW COURSE OUTLINE



Introduction to Equities Investment

Participants will understand how financial market ecosystem works and the impact of market trends, events and technology advancements in shaping financial market

Fundamental Analysis

To determine a company's intrinsic value and relate to market price of securities and maintain awareness of major industry trends that may potentially impact company's performance

Technical Analysis

To determine the existence and strength of trends to forecast future price movements and market positions to take

Behavioural Finance

To understand how individual irrational financial decisions can impact on investment decisions and performance of investments

Complete Equities Investment System

To derive a process in making rational investment decisions through understanding of individual investment objective with active risk management and accounting techniques

TRAINER PROFILE



With more than 10 years of experience, Jay Chia is a dual-licensed Trading Representative and Financial Advisor with Phillip Securities Pte Ltd and holds a degree specialising in finance. He applies his extensive financial knowledge of Fundamental Analysis and Technical Analysis to form basis for his market insights. Extremely passionate and highly approachable, Jay loves to share and discuss his knowledge so as to educate his clients and the community.

He is a well-sought after financial trainer, and has conducted numerous trainings around the South-East Asian region, including Singapore and Malaysia, having taught over 500 individuals. He focuses on helping clients achieve their financial goals and increase their probability of success in the stock market through unique and simple strategies, combining Fundamental and Technical analysis.

EMPOWERING TRADING REPRESENTATIVES



Raise TR performance with improved awareness of financial markets and advisory skills

Proving value to clients with improved client servicing skills

WSQ certified assessment to allow management to gauge the level of TR competencies

Ability to identify themselves professionally with the acquired certification and improve employee retention

Career progression in the financial industry towards senior dealers/ remisiers and head of dealing team

Building themselves as credible wealth-advisors and providing assurance to their clients.

Mr Lim Wah Tong, past Chairman of Securities Association of Singapore (SAS), said "The SAS fully encourages Trading Representatives and Remisiers to continuously upskill and enhance their capabilities. The structured IBF Standards appropriately reflects the evolving needs of industry and will better prepare the Trading Representative to handle the new demands of the market and the client. Broking firms of the SAS support the IBF Standards for the industry and will encourage practitioners to upgrade their skills and knowledge through certification and deliver even more value to their clients."

REGISTRATION



6505 0192 / 6505 0199

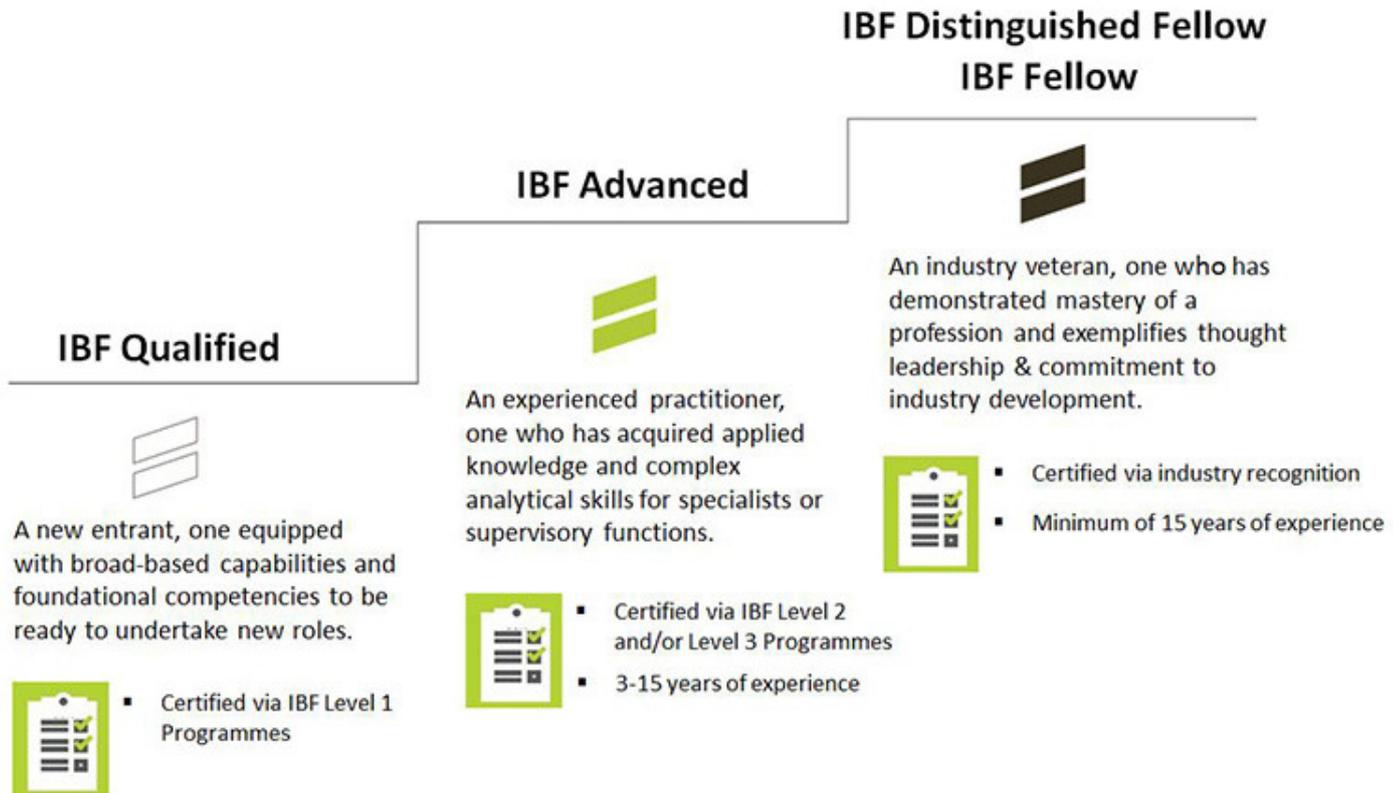
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IBF CERTIFICATION



Find out more about IBF certification at <https://www.ibf.org.sg/certification/Pages/Why-be-Certified.aspx>

FUNDING QUANTUM

This programme has been accredited under the IBF Standards, and is eligible for funding under the IBF Standards Training Scheme (IBF-STS), subject to all eligibility criteria being met. Candidates are advised to assess the suitability of the programme and its relevance to their business activities or job roles.

IBF-STS provides 70% funding for direct training costs subjected to a cap of S\$7,000 per candidate per programme subject to all eligibility criteria being met.

With effect from 1 July 2016, Singapore Citizens aged 40 years old and above are eligible for 90% co-funding of direct training costs, subject to a cap of S\$7,000 per participant per programme.