

Essentials of Investment Planning

1-Day Workshop

Date: December 17, 2011 (Saturday)

Time: 9.30am - 5.00pm

Facilitator: Mr. Yap Chee Wah

Venue: Room 108, Level 1,

KDU University College,

Damansara Jaya Campus

Understanding Investment Concepts

- Various concepts & measurements of risk and return
- Risk-return tradeoffs
- Risk diversification & securities correlation

Basics of Equity Investments

- Understanding fundamental valuations (Present Value & Relative Valuation methods)

Fixed Income Securities Analysis

- Key concepts in fixed income/bonds
- Valuation of fixed income securities
- Measuring volatility (risk) using duration & convexity

Unit Trusts

- Risk & return measurements for unit trust funds

Portfolio Management

- 3 simple steps of Investment Planning
- Investment styles of professional fund managers
- Measurements of investment performance

Facilitator Profile of Yap Chee Wah

Yap Chee Wah holds a Bachelor of Economics (Honours) from the University of Malaya, and is a Chartered Financial Analyst (CFA) charterholder since 2009. Currently, he is heading the analysis and product development team on investment for a takaful operator.

Chee Wah started his career in 1999 in insurance claims and later became the Assistant Head of Research for an investment advisory firm, and subsequently specialises in fixed income and structured products under a major foreign insurer. He went to Vietnam in 2008 to serve as an equity and corporate finance analyst for a Vietnamese financial services firm and then to Malaysia to head a research team on banking and investment products for high networth clients in a leading domestic bank.

Who is this for?

Working Professionals, Executives, Managers, Unit Trust Consultants, Insurance Agents, Bank Officers, Wealth Advisors and General Public.

Course Fees

(includes: course notes, certificate of attendance, refreshments & light lunch)

➤ **Individual (1 pax)**

- RM 180 per pax

➤ **Group of 3 or more (min. 3 pax)**

- RM 150 per pax

I am interested in signing up. Please contact me:

Name: _____

Contact Number: _____

E-mail: _____

To enrol kindly call, fax or email us at:

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