AB MAXIMUS

Capital Markets Training

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Applied Value Investing Workshop

12 CPD HOURS

Programme Code: P180717YLR

Overview

This workshop is designed for individuals who want to build long-term wealth using a proven approach. This wealth building process is executed through a systematic approach of diligent research and patient execution of an investment strategy, adapted by the participant to fit his own risk appetite and investment objectives.

This workshop advocates the buy-and-hold strategy and recommends minimum trading. Therefore, this workshop is best suited for investors who do not have time to trade in stocks and monitor the market frequently, but enjoy the process and challenge of developing a deep knowledge in the companies they have invested for the long term.

Key Learning Outcome

After completing this course, participants should be able to:

1. Interpret basic financial reports and ratios for investment decisions.
2. Search for financial data online and analyse this data to filter out investment opportunities.
3. Construct an equities portfolio that should generate the expected return, enabling investors to achieve wealth building goals.
4. Monitor portfolio performance and make appropriate rebalancing when necessary.
5. Determine entry and exit points in the equities market, guided by a disciplined process of valuation and taking advantage of market volatility.

IBF-FTS Funding

This programme is recognised under the Financial Training Scheme (FTS) and is eligible for FTS claims subject to all eligibility criteria being met. For more information please visit IBF Website.

Please note that in no way does this represent an endorsement of the quality of the training provider and programme. Participants are advised to assess the suitability of the programme and its relevance to participants' business activities or job roles.

The FTS is available to eligible entities based on the prevalent funding eligibility, quantum and caps. FTS claims may only be made for recognised programmes with specified validity period.

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Course Methodology

- Short lectures
- Hands-on exercise
- Using online tools to analyse financial data
- End of module quiz
- Case studies explanations

Who Should Attend

- Individuals from the Finance Industry
- Trading Representatives
- Remisiers

Speaker's Profile

Puah Soon Lim, CFA graduated from National University of Singapore with a Bachelor degree in Business Administration. He is also a CFA. Soon Lim has more than 20 years of experience in the financial and investment industries, spanning from money broking, merchant banking, bond sales and trading, investment planning, insurance sales and management of a wealth management sales team. His last decade was spent in a stock broking firm's wealth management unit.

He is currently Associate Director of an Independent Financial Advisor. He works with both individual and institutional investors to provide customised advice on optimal asset allocation. His extensive experience and thorough knowledge in wealth management enables him to break down difficult concepts into easy-to-understand components.

Register your interest today!

For in-house training request, please contact Alson at alson@abmaximus.com.
Competitive corporate discounts available for bulk registration.

Visit https://www.abmaximus.com/supplementary-cpd-courses to find out more about the other courses available.

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