



Overview

This is a short, intensive course designed to provide participants with an introduction to the 2 largest securities and capital markets in the world – equities and fixed income. This course will equip them with the basic analytical tools and frameworks to perform valuation appraisals which can then be utilized as the critical basis for the formation of a trading or investment view.

In the equities market, fundamental analysis looks to measure a company's true projected value and to base investments upon this type of calculation.

Traders who buy and sell on fundamentals – such as revenue, earnings, assets, liabilities and growth – believe that an equity investment's performance should be based on the economics of the underlying asset are compelling.

Participants will learn from a former senior corporate / investment banker on evaluating simple yield- and risk measures on equities and fixed income investments. The emphasis is on the development of a 'real-world' toolkit that is directly applicable to investment decision process performed by equity and fixed income traders, investors and support personnel.

Learning Objectives

By the end of the course, you will be able to:

- Understand the fundamental macro and micro economic factors impacting equity market securities
- Understand the methodology and principles of using financial accounting metrics and indicators to assess the economic viability of an equity asset
- Learn how to perform basic cash flow modelling and fundamental valuation analysis applicable to mainstream valuation models for both fixed income and equity securities
- Understand the similarities and differences between equity and fixed income securities
- Gain an overview of the fixed income market, covering basic bond terminology, fundamentals, yield calculations and the specifics of corporate, government and municipal bonds

Who Should Attend

- PMETs supporting financial services in the equities and fixed income markets
- Aspiring proprietary traders and investors seeking to apply fundamental analysis to trading equity and fixed income securities

Assessment

- An assessment will be conducted at the end of the course

Fees and Funding

Fees
S\$1,712 (after GST) for non-Singapore Citizens and non-Permanent Residents.

SkillsFuture Singapore (SSG) Funding:

S\$513.60 (after GST) for Singaporeans below 40 and Permanent Residents.
S\$193.60 (after GST) for Singaporeans age 40 and above.

Funding

SkillsFuture Series

Course fee grant at 70% of course fees (excluding GST) for participants who are successfully enrolled by SMU into approved courses under the Programme. Participants must be Singapore Citizens or Singapore Permanent Residents.

SkillsFuture Mid-Career Enhanced Subsidy ("MCES")

Up to 90% of course fees for Singapore Citizens aged 40 years and above

Enhanced Training Support for SMEs ("ETSS")

Up to 90% of course fees; and 80% of basic hourly salary capped at \$7.50/hr for local employees of SMEs.

SkillsFuture Credit

Singapore Citizens aged 25 and above, and self-funding may use their SkillsFuture Credit (up to S\$500) to defray part of the course fee.



Mr. Peter Chung

Peter Chung has extensive experience in the banking industry in frontline banking positions since 1982 starting with Bank of America followed by Amro Bank NV, Royal Bank of Canada, DBS and recently with UBS, the largest global wealth manager. His most recent appointment as Director of Wealth Management in UBS from mid-2008 to 2015 saw him managing a total asset base of more than USD 700 million.

He is skilled in financial consulting specifically in the areas of debt and equity capital markets, and investments for Corporates as well as Personal Financial Planning. He holds a B.Com from McMaster University (Canada) and has a Wealth Management Diploma from UBS University. He is IBF Qualified Wealth Management for Relationship Management – Private Banking and has also attained the IBF Financial Industry Competency Standard in Wealth Management. Peter has also trained international bankers in Loan Syndication and many local companies on Financial Analysis for Non-Financial Managers.

Registration

For enquiries and customer support, please email academy@smu.edu.sg or contact us at **6808 5499**