



ACCREDITED TRAINING PROVIDER

International Securities & Investment

A 2-day training event

International Securities & Investment covers key financial principles and products including assets and markets, equities, bonds, derivatives, investment funds, retirement planning, loans, mortgages and life assurance.

It explores the broader economic environment in which the financial services industry operates and looks at how economic activity is determined and managed in different economic and political systems. Drill-down exploration of financial services regulation focuses on financial crime, insider trading and market abuse, provide delegates with an understanding of ethical behaviour and acting with integrity.

Course Objectives

This course is specifically designed to meet the practical needs of new entrants to the global investment industry. Focusing on international markets, it provides an overview of all areas of investment and professional terminology from a global perspective without focusing on a specific jurisdiction.

Who should attend?

This course is appropriate for new entrants to financial services with an interest in global investments.

Our unique 2-day classroom led training course includes:

- Up-to-date and relevant case studies
- A sample practice paper
- Smaller class sizes which focus more on teacher/student interactions
- An expert trainer with practical industry experience

Progressive study pathways:

- This qualification can be taken as a **stand-alone unit** or taken as part of Investment Operations Certificate (IOC).
- To achieve the **CISI Investment Operations Certificate (IOC)** combine any three Technical, Regulatory or Introductory units (please see the final page for options).

Our unique 2-day classroom training course features:

- Content-rich study materials
- Up-to-date and industry relevant case studies
- In-depth analysis of course topics
- Smaller class sizes which focus more on personal attention & expert-delegate interaction
- An experienced, expert practitioner-trainer with real industry track-record & available for delegate Q&A for up to 90 days to help in exam preparation following the course.

Methodology

The expert trainer will use slides, case studies, exercises and lead workshop-style group discussion to engage the delegates in practical learning and understanding. The trainer remains available to delegates for Q&A related to the course topic for 90 days following the course dates.

Advanced Preparation: None

Training Type: Classroom

Learning Level: Introduction

Field of Study: Capital Markets

This training course is scheduled for:

London UK, 2 days

May 16 - 17, 2019

November 14 - 15, 2019

The price per delegate for this 2-day programme is £1,995.00

(+ UK VAT when applicable)

1:1 training courses available at 2x per delegate price!

For an in-house training option, alternative dates and locations are available.

We are happy to add extra content to the programme to meet additional requirements from your company. Please contact us for further information.

www.riskrewardlimited.com

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Course Outline

Session 1: Introduction

- The Financial Services Industry

Session 2: Economic Environment

- Economic Environment

Session 3: Financial Assets and Markets

- Cash Deposits
- Money Market Instruments
- Property
- Foreign Exchange Market

Session 4: Equities/Stocks

- Equities/Stocks

Session 5: Bonds

- Characteristics
- Corporate Bonds

Session 6: Derivatives

- Derivatives Uses
- Futures
- Options
- Terminology
- Derivatives/Commodity Exchanges
- Swaps

Session 7: Investment Funds

- Introduction
- Open-Ended/Mutual Funds
- Closed-Ended Investment Companies
- Real Estate Investment Trusts
- Exchange-Traded Funds
- Hedge Funds
- Private Equity

Session 8: Financial Services Regulation

- Introduction
- Financial Crime
- Insider Trading and Market Abuse

Session 9: Other Financial Products

- Retirement Planning
- Loans
- Mortgages
- Life Assurance

Course schedule:

Full day classroom training
09:30 – 17:00



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RISK REWARD
GLOBAL BANKING & FINANCIAL SERVICES EXPERTS

International Securities & Investment

Registration & Payment Details

Please mark **X** in the box and complete the form with BLOCK LETTERS

Dates:

May 16 - 17, 2019

November 14 - 15, 2019

Course Fee (per person):

GBP £1,995 (+ UK VAT when applicable)

Email*

First name*

Last name*

Job title / Position

Department

Company Name

Company Address

City

Postcode

Country*

Telephone (direct)*

Telephone (main)

Approving Manager

Training Manager

CISI Certificate & Diploma Candidates

Please register, purchase your CISI workbook and online learning tools, and arrange to sit the exam at a testing centre directly with the professional body via www.CISI.org.

Please tick that box if you don't want to be subscribing to the Global Risk Update magazine.

Data Privacy & Update of Contact Details Risk Reward Limited is fully compliant with the Data Protection Act. The information you provide will be safeguarded by Risk Reward Ltd. We do not rent, sell or exchange your details to anyone without your consent. Your details are never given to third parties. If you wish to update your details, please email: info@riskrewardlimited.com with your OLD and NEW details. Please allow 10 days to see the changes take effect. Thank you.

Terms and Conditions All cancellations must be received in writing 20 working days prior to the start of the course with acknowledgement from Risk Reward. Course fees must therefore be paid in full if a cancellation occurs within 20 working days of the start of the course. We are always happy to welcome a replacement onto the course. Kindly send us written notification of your replacement by email, fax or telephone. Written cancellations received 20 working days or more before the start date of the course receive a full refund less a charge of 20%. For any written cancellation requests that reach us less than 20 working days before the event, no refunds will be given. Risk Reward reserves the right to the final decision if any dispute arises.

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Signature

Date

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Investment Operations Certificate (IOC)

Progressive study pathways options

- For UK Candidates the IOC is achieved by passing any three of the following units*;

(* please note that the following list only contains the IOC courses that Risk Reward offers and not the complete selection, for the full list please visit www.cisi.org)

- **Introductory**
 - International Introduction to Securities and Investment
- **Regulatory**
 - UK Financial Regulation
- **Technical**
 - Risk in Financial Services
 - Global Financial Compliance
 - Combating Financial Crime
 - Managing Cyber Security
 - Operational Risk