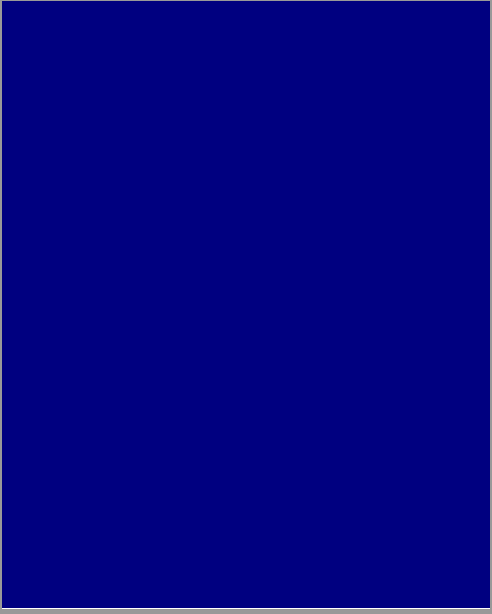


JO6 Investment principles, markets and environment – Two Day Workshop

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| <p>Workshop Timetable</p> | <ul style="list-style-type: none"> • 9.30am – 4.30pm approximately |
| <ul style="list-style-type: none"> • Overall Workshop Outline | <ul style="list-style-type: none"> • This two day revision workshop incorporates a blend of tutor led activity and a number of syndicate exercises. Opportunity will be taken to practice financial calculations and formulae • It is assumed that all delegates will have worked through the CII syllabus text prior to attending the workshop • All core topics cannot be covered due to time constraints |
| <ul style="list-style-type: none"> • Syllabus Areas Covered | <ul style="list-style-type: none"> • Introductions/housekeeping • Economic environment <ul style="list-style-type: none"> ✓ Economic cycle, fiscal / monetary policy, effect on interest rates /currency/ bonds / equities • Portfolio risks and returns <ul style="list-style-type: none"> ✓ Types of risk, measurement of risk, correlation, covariance CAPM, MPT, measurement of return • Risks and returns of the main asset categories <ul style="list-style-type: none"> ✓ Cash, bonds, equities, analysing companies, property • Alternative investments and derivatives <ul style="list-style-type: none"> ✓ commodities, art & antiques, structured products, futures & options |

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- Portfolio construction
 - ✓ Efficient frontier, styles of investment, efficient market hypothesis, switching and churning
 - Measuring portfolio performance
 - ✓ Financial calculations, Sharpe ratio, alpha, beta, information ratio, money weighted rate of return, time weighted rate of return, performance attribution