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learning solutions offering

2023 – Training catalogue – Financial Market Digital Training





With the **MiFID II regulations**, staff providing investment advice or giving information is required to have the **specific knowledge and competencies**. Therefore this training focuses on the key concepts related to investment products, finance and economy. The purpose of this training is to understand **how financial markets function**, what the **key factors on investment performance** for different asset classes & financial instruments are, and finally **understand the fundamentals of portfolio management**.

1. Financial markets



- Focus on key markets and players
- Major factors affecting financial markets
- Market overview and economic forecast
- Economic cycles and modern financial history
- Traditional vs behavioral finance

2. Asset classes and financial instruments



- Overview and comparison of asset classes
- Focus on fixed income
- Focus on equity
- Focus on funds/ETF
- Focus on other asset classes

3. Portfolio management



- Portfolio management process
- Planning phase
- Execution phase
- Feedback phase

4. Knowledge Check



- Randomized selection from a pool of questions. The participants will receive an individual certificate once the knowledge check is validated.

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