

Program Title

Financial Mathematics

Program Duration

3 hours

Program Objectives

By the end of the program the delegates shall be able to:

- Appreciate the importance of time value of money
- Understand various mathematical formulas required for making calculations while preparing a financial plan
- Apply acquired knowledge in creating investment portfolios

Program Outline

This activity-oriented course revolves around the following key input areas:

Day	Time	Session	Details	Methodology
I	AM/PM	Introduction	<ul style="list-style-type: none"> ○ Time Value of Money ○ Compounding, Discounting, Present Value, Future Value 	ILD Exercises
		Excel Tools	<ul style="list-style-type: none"> ○ PV, FV, FV for multiple investments ○ Combination of Lump sum + Regular investments ○ IRR, XIRR 	ILD Exercises
		Usage of these tools	<ul style="list-style-type: none"> ○ Understanding SIP-RCA, Value Averaging ○ Risk Measurement Tools – Standard Deviation, Beta, R-Squared, Sharpe Ratio 	ILD Exercises
		Other Application	<ul style="list-style-type: none"> ○ Portfolio Construction – factors to consider ○ Markowitz Portfolio Selection theory ○ Types of Asset Allocation – impact on Portfolio Performance 	ILD

Who should attend?

Distributors/Agents/Employees with vintage > 6 months in Wealth Management

Min/Max Participants

15-20