Claritas Prep Pro

From 6 April, 2014 to 8 June, 2014
Sundays and Wednesdays (18:30 - 21:30)
Jumeirah Emirates Towers, Sh. Zayed Road, Dubai

This two-month course will prepare participants for the Claritas Investment Certificate examination.

The Claritas Investment Certificate is a new global certification offered by the CFA Institute. The goal of the Claritas Investment Certificate program is to provide a fundamental understanding of the essential aspects of the investment industry. The certificate is awarded by the CFA Institute to candidates who pass the Claritas exam.

WHO SHOULD ATTEND?

This Claritas program is ideal for anyone working in financial services who seeks a clear understanding of the investment industry and their professional responsibilities within it. The program promotes a shared understanding of the industry, builds employee confidence, and raises effectiveness across all professional disciplines involved with it, outside of investment roles; from client services to compliance; from human resources to IT and operations; and from sales and marketing to legal and administrative services.
COURSE OUTLINE

The course consists of 21 chapters, organized into seven modules.

MODULE 1: OVERVIEW
It is about getting to the heart and the core purpose of the investment industry – its vital role in the world: from helping people save for the future to funding schools, hospitals, roads and other essentials. The benefits this brings when done well (ethically and all parts working together) help serve society.

» CHAPTER 1 The Investment Industry: A Top-Down View

MODULE 2: ETHICS AND REGULATION
This module focuses on the essential foundations for the investment world – ethics and regulation. The firm ground on which we build for our clients: trust, reputation, confidence and value – the essentials of a strong and healthy client-focused industry.

» CHAPTER 2 Ethics and Investment Professionalism
» CHAPTER 3 Regulation and Supervision

MODULE 3: TOOLS AND INPUTS
This is about understanding how the (economic) world works - the big picture and the fine detail. How the actions of individuals, corporations and governments play out at micro, macro and international levels, how this translates to a company’s finances, and how to get a clearer understanding of what this all means.

» CHAPTER 4 Financial Statements
» CHAPTER 5 Quantitative Concepts
» CHAPTER 6 Microeconomics
» CHAPTER 7 Macroeconomics
» CHAPTER 8 International Trade and Foreign Exchange

MODULE 4: INVESTMENT INSTRUMENTS
This module covers the basic investment options, what they are and their purpose - from conventional equities and bonds to more specialized investments such as real estate and derivatives.

» CHAPTER 9 Equity Securities
» CHAPTER 10 Debt Securities
» CHAPTER 11 Derivatives
» CHAPTER 12 Alternative Investments

MODULE 5: INDUSTRY STRUCTURE
The industry is complex and highly interdependent. This module looks at how the industry helps us invest, who the participants are and what they do, the different markets where investments take place, and the investment products themselves.

» CHAPTER 13 Structure of the Investment Industry
» CHAPTER 14 Investment Vehicles and Structures
» CHAPTER 15 Investment Market Characteristics

MODULE 6: INDUSTRY CONTROLS
Controls are critical in helping ensure everything runs smoothly. In the fast moving world of investments and risk it is essential to understand how systems and controls are used in the industry to ensure the client is properly served.

» CHAPTER 16 Investment Industry Documentation
» CHAPTER 17 Risk Management
» CHAPTER 18 Performance Evaluation

MODULE 7: SERVING CLIENT NEEDS
This is about focusing on clients – gaining a clear understanding of their needs, circumstances, motivations and ambitions so investments can be allocated and managed in the right way for them.

» CHAPTER 19 Investor Needs and Investment Policy
» CHAPTER 20 Asset Allocation
» CHAPTER 21 Active and Passive Investment Management
PREREQUISITES
There is no education or experience requirement; however candidates should feel comfortable with the English language.

HOW YOU WILL LEARN
The course will be conducted along workshop principles with formal lectures and interactive examples. Case studies will illustrate the application of each product and service in an operations environment. Each learning point will be reinforced with practical exercises and case studies.

COURSE REGISTRATION TERMS & CONDITIONS
Course Fee: AED 5,000 per person
Send 2 or more registrations and get a 10% discount on the total course fee. Special 20% discount to university students. Please register by sending an email to academy@nasdaqdubai.com

For details please call
NASDAQ Dubai: Call Mansi Vivek on +971 4 305 5461 or Sana Belgaonkar on +971 4 305 5469
Genesis Institute: 800 346 (toll free) or send an email to Kavita Gaglani at kgaglani@genesisreview.com

Pre-payment is required for all enrolments. For cancellations received (in writing by email or fax):
» 15 days before the course start date there will be no cancellation charges.
» 8 to 14 days before the course start date, 50% of the course fee will be charged.
» 7 days before the course start date, 100% of the course fee will be charged.

Another delegate from the same company may substitute in the place of the primary delegate should the need arise.

EXAM REGISTRATION AND FEES
Exam Registration Fee: US$ 685 per person
Includes access to all study materials (the eBook, practice assessments, a mock exam), and one exam sitting. Candidates can register for the exam directly with the CFA Institute on their website www.cfainstitute.org. The multiple choice, computer-based exam is offered at test centers around the world.

ABOUT THE FACULTY

Binod Shankar, FCA, CFA
Senior Manager and Trainer – Genesis Institute

Binod has spent 18 years in corporate life. He started his career in a bank where he cut his teeth on project appraisal of small and medium enterprises. He then worked for some of the top names in audit and consulting (KPMG, Arthur Andersen and Ernst & Young) where he supervised audit, financial due diligence, financial feasibility and valuation assignments across a range of industries. He then joined a major property developer as Manager- Financial Analysis where he helped set up the budgetary, pricing and financial feasibility systems and the financial Management Information System.

Binod has been teaching advanced finance and accounting courses since 1996. He brings a blend of relevant practical experience and strong conceptual knowledge to the classroom. Binod is a Chartered Accountant and a CFA charter holder.

Yasir Ali, ACCA, CIMA, FRM, CFA
Senior Manager and Trainer – Genesis Institute

Yasir Ali is a finance professional with over 14 years of experience, including 10 years of teaching experience. He has worked across multiple industries, advising the implementation of Foreign Investment Appraisal, Risk Management, preparing financial models, etc..

Yasir has been teaching ACCA, CFA, CIMA and FRM courses since 2001. He brings to the class a mix of valuable regional financial expertise backed by excellent professional qualifications.