

Mastering Investment Fundamentals

Duration: 5 Days

Language: en

Course Code: PF1-163

Objective

By the end of this course, participants will be able to:

- Understand the key concepts of risk, return, and diversification.
- Differentiate between major investment types (stocks, bonds, mutual funds, ETFs).
- Interpret market indicators and basic financial statements.
- Build and manage a diversified investment portfolio.
- Recognise behavioural biases and avoid common investment mistakes.

Audience

This course is ideal for:

- Beginners looking to understand investing principles.
- Young professionals and entrepreneurs managing personal wealth.
- Business and finance students seeking applied financial knowledge.
- NGO staff or nonprofit leaders managing endowments or funds.
- Anyone planning for long-term financial goals or retirement.

Training Methodology

This course is delivered using a blended, interactive approach that bridges theory and application. Participants will engage in hands-on exercises such as simulated investment planning, portfolio construction, and market analysis. The sessions include interactive lectures, visual breakdowns of financial tools, group activities, and investment case studies drawn from real-world markets. Learners will receive templates, investment checklists, and tools they can use beyond the classroom to apply what they've learned in practical settings.

Summary

Understanding the core principles of investment is essential for anyone looking to build wealth, manage financial risk, or make informed decisions in today’s dynamic markets. This course offers a solid foundation in investment fundamentals, covering key financial instruments, risk-return trade-offs, and portfolio-building strategies.

Whether you're a beginner aiming to enter the world of investing or a professional seeking to sharpen your financial acumen, this course will help you decode financial jargon, analyse market trends, and make confident investment choices. It combines theory with practical application,

empowering you to take control of your financial future.

Course Content & Outline

Section 1: Introduction to Investments

- Why invest? Wealth-building and financial independence.
- The power of compounding and time value of money.
- Overview of financial markets and instruments.

Section 2: Understanding Asset Classes

- Equities (stocks): fundamentals and valuation basics.
- Fixed income (bonds): types, ratings, and yield.
- Mutual funds, ETFs, real estate, and alternative assets.

Section 3: Risk, Return & Diversification

- Measuring risk and return.
- Modern Portfolio Theory and diversification principles.
- Risk tolerance, investment horizon, and asset allocation.

Section 4: Market Analysis and Behavioural Finance

- Introduction to fundamental vs. technical analysis.
- Market trends, indicators, and financial ratios.
- Investor psychology and behavioural finance pitfalls.

Section 5: Building Your Investment Plan

- Setting goals and creating a personal investment strategy.
- Managing your portfolio over time.
- Ethical investing and ESG considerations.
- Case study: Designing an investment plan with $10,000.

Certificate Description

Upon successful completion of this training course, delegates will be awarded a Holistique Training Certificate of Completion. For those who attend and complete the online training course, a Holistique Training e-Certificate will be provided.

Holistique Training Certificates are accredited by The CPD Certification Service (CPD), and are certified under ISO 9001 and ISO 29993 standards.

CPD credits for this course are granted by our Certificates and will be reflected on the Holistique Training Certificate of Completion. In accordance with the standards of The CPD Certification Service, one CPD credit is awarded per hour of course attendance. A maximum of 50 CPD credits can be claimed for any single course we currently offer.

Categories

Banking and Finance, Finance, Accounting & Budgeting, Management & Leadership, Project Management

Tags

Asset Management, investment, Market Analysis, investment plan

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Top 7 Types of Investment Strategies: Finding Your Path To Financial Success

Learn how investment strategies can help you achieve financial success. Explore the top 7 types of strategies, find the best fit for your goals, and understand the key components that form a robust investment approach.