# Introduction to Investments

By Wong Kah Teck, CFA, MBA (Chicago Booth), BSc (Wharton School) and BA (University of Pennsylvania)

## Program Overview

*It is never too early or too late to start investing*. This Program gives practical and objective insights into personal investing. We will be introduced to a structured investment approach to build wealth *over time* that suits one's return objectives and risk tolerance. The program will also cover the fundamentals of investment vehicles such as stocks, bonds, unit trusts and exchange traded funds (ETFs). We will also see how we can use online resources to invest. This program will equip us with a solid foundation to make better investment decisions and avoid costly investment mistakes. This session is structured to be interactive.

## Program Objectives

Upon successful completion of this Program, participants will be able to:

- Explain the importance of investing
- Adopt a structured approach to investing
- Design an investment portfolio to build wealth over time that suits one's return objectives and risk tolerance
- Describe a well-thought out investment portfolio
- What to look out for when investing in stocks, bonds, unit trusts and ETFs
- Use online resources to invest
- Avoid costly investing mistakes

## How Will You Learn

- Case studies and exercises
- Interactive lectures and group discussion

## Date and Venue

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|---|---|
| 12 JAN | Sat 09:00 – 17:30<br>Perdana Room,<br>Royal Lake Club, Kuala Lumpur |

## Fee

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|---|---|
| Standard | RM 1,700 |
| Early Registration* | RM 1,500 |

10% discount applies for group registration of 3 or more from the same organization

* by **12 Dec 2018**

## Target Audience

This Program is ideal for you if you have minimal investment knowledge and experience. This program is also suitable for you if you have a strong desire to make your own investment decisions and wish to start critically evaluating investment products. The Target Audience can include:

- Fresh graduates
- College and university students
- New entrants to financial markets
- Anyone that would like to get started on investing

## Others

10 SIDC CPE points

Eligible for HRDF claim

## Prerequisites

- None

Participants are required to bring along their laptops.

## Enquiries

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## Outline

**Session 1: Introduction**

- What is investing?
- Investing vs. trading and saving
- Why invest?

**Session 2: Building an Investment Portfolio**

- Considerations when building an investment portfolio
- Knowing your investment objectives and risk tolerance
- An overview of core asset classes-historical returns, risk and expected returns
- Asset allocation-definition and importance
- Monitoring and rebalancing your portfolio-the why and the how

Case Study: Building an Investment Portfolio

**Session 3: Investment Vehicles**

- Stocks, bonds, unit trusts and ETFs:
    - Mechanics
    - What to consider before investing
    - Pros and Cons
    - How suitable are they for your portfolio?

Case Study: Analysing the investment vehicles above

**Session 4: Useful Online Resources, Trends, Summary and Conclusion**

- Online investment resources you can use
- Common investing mistakes and how to avoid them
- Looking ahead-what experts say about the investment landscape
- Program summary and conclusion

## Trainer’s Profile

Kah Teck has more than a decade of capital markets experience. He was a portfolio strategist in CIMB Investment Bank and Am Investment Bank where he was responsible for spearheading investment advisory and product development initiatives and also played an active role in evaluating numerous plain vanilla and hybrid fund raising options. He has also worked for the Securities Commission in research and formulating capital market development policies.

Now the Managing Director and Principal Trainer for FMTCS Sdn Bhd, Kah Teck passionately shares his knowledge and experience with professionals in many of Malaysia’s leading financial institutions and government-linked institutions. His trainees frequently credit him with the ability to make finance interesting and demystify complex finance concepts.

Kah Teck graduated *summa cum laude* with a dual degree in finance and economics from the University of Pennsylvania’s Wharton School and School of Arts and Sciences, and holds an MBA (with Honors) from the Booth School of Business, University of Chicago. He is also a Chartered Financial Analyst (CFA) charterholder. Kah Teck was also awarded the prestigious ASEAN scholarship to pursue pre-university studies in Singapore.

His teaching and research interests are in corporate finance, derivatives, securities valuation, financial risk management, financial modelling and financial analysis.

## Registration Form

**Introduction to Investment**
on 12 Jan 2019, Perdana Room, Royal Lake Club, Kuala Lumpur
09:00 – 05:30
Registration commences at 08:30

Fee: RM1,700 (RM1,500 by 12 Dec 2018)

**Name** : ______________________________

**Designation** : ______________________________

**Company** : ______________________________

**Contact Tel. No.** : ______________________________

**Fax No.** : ______________________________

**Email Address** : ______________________________

**Training Dept.** :

**Name:** : ______________________________

**Contact Tel. No.** : ______________________________

**Email Address** : ______________________________

### Payment Details

☐ **BY CHEQUE** Cheques should be made payable to "**FMTCS Sdn Bhd**". Please indicate the following details at the back of your cheque.

- Your Full Name as per registration detail
- Contact Number & Email Address

☐ **BY TELEGRAPHIC TRANSFER**

- Participants will bear all bank telegraphic transfer charges.
- Once we receive your registration form, we will provide you with an invoice and bank-in details.

### Cancellation and refund policy

Cancellations are allowed up to 15 working days before the date of the program.

Cancellation made with less than 15 working days will not receive a refund but may nominate a substitute.

### Enquiries

Please contact +6 016 633 2883 or email us at fmtcs.sb@gmail.com

### Disclaimer

FMTCS Sdn Bhd ("FMTCS") reserves the right to alter any part of the published programme or faculty. In the event of course cancellation by FMTCS due to unforeseen circumstances, FMTCS limits its liabilities to refunding tuition fee of the course.

Fee includes tuition, documentation, lunch and refreshments. Participants are responsible for their own flights and accommodation. An invoice will be sent upon receipt of registration form.