

CERTIFIED PORTFOLIO MANAGER (CPM)



**Ramaq
Chools**
Consulting & Training

Email: info@ramaqchools.com

Phone: +966536834733

Website: ramaqchools.com

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Introduction to Certified Portfolio Manager

Imagine mastering the art of portfolio management, utilizing advanced valuation and risk management techniques to steer investments towards success. The Certified Portfolio Manager (CPM) designation is designed for financial professionals seeking to enhance their skills and knowledge in portfolio management. This course covers eight core concepts, including quantitative methods, financial statement analysis, corporate finance, fixed income analysis, equity analysis, fiduciary responsibility, derivatives, and portfolio management. The CPM course prepares you thoroughly for obtaining the CPM credential from the Academy of Certified Portfolio Managers (ACPM).



Why Choose Chools?

Numbers That Speak for Themselves:

- **10,000+ Successful Alumni:** Join a network of impactful professionals.
- **95% Job Placement Rate:** Secure your future with Chools' proven track record.
- **20+ Years of Excellence:** Trust in a legacy of education and industry expertise.
- **200+ Industry Partnerships:** Leverage our connections for real-world insights and opportunities.

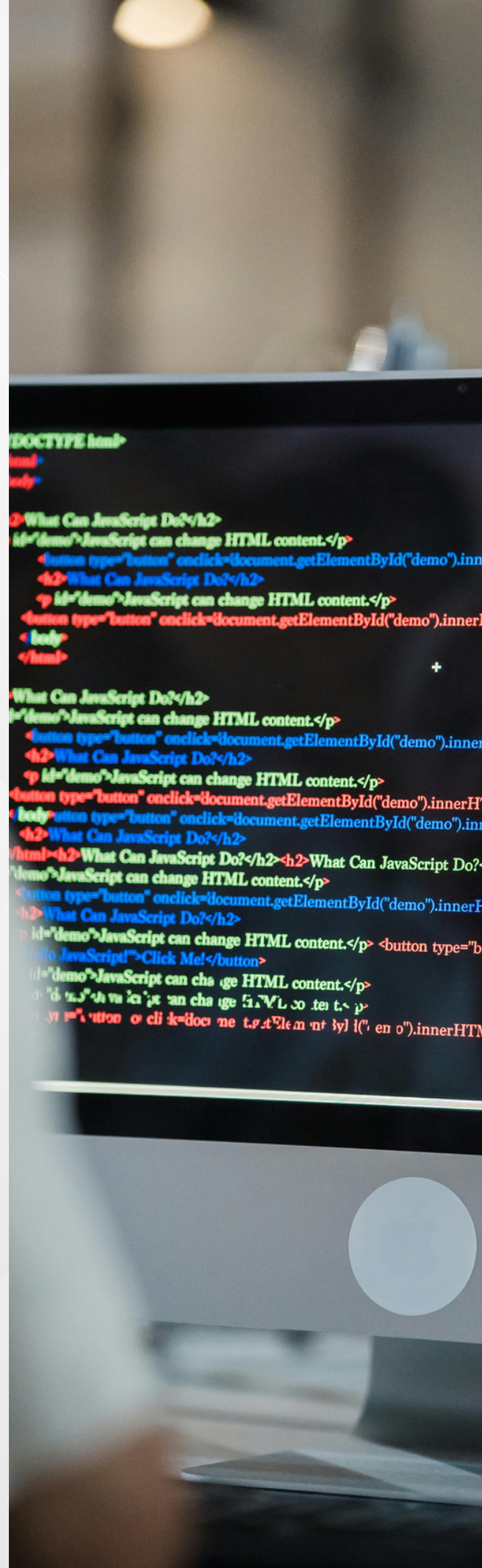
What Sets Us Apart?

- **Expert Instructors:** Learn from industry veterans with hands-on experience.
- **Hybrid Learning Model:** Balance online flexibility with in-person engagement.
- **Comprehensive Curriculum:** Stay ahead with courses designed meet market demands.
- **Community and Networking:** Be part of an active community of learners and professionals.

Who Can Apply?

Eligibility Criteria:

- Certificate, diploma, or academic degree providing evidence of a four-year undergraduate degree.



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- At least three years of employment in the financial services industry or a letter of recommendation from a supervisor in the same field.
 - Completion of a self-study program and an on-campus week at a university partner, followed by online, proctored, closed-book course exams.

Program Overview

The CPM Program provides a comprehensive education in portfolio management. Our curriculum covers a wide range of topics to ensure a thorough understanding, combining theoretical knowledge with practical, hands-on experience.

Learning Mode:

- **Hybrid Learning Model:** Combines online learning with in-person sessions for flexibility and interactive engagement.
- **Interactive Sessions:** Includes live webinars, workshops, and Q&A forums with expert instructors and peers.
- **Self-paced Learning:** Access course materials anytime, allowing you to learn at your own pace.





PROGRAM OBJECTIVES

- Build knowledge and skills in quantitative methods, financial statement analysis, and corporate finance.
- Understand fixed income analysis, equity analysis, fiduciary responsibility, derivatives, and portfolio management.
- Prepare for the Certified Portfolio Manager (CPM) exam.
- Foster continuous learning and personal growth.
- Encourage teamwork and collaboration.
- Prepare for advanced roles in portfolio management.

EXPECTED OUTCOMES

- Proficiency in portfolio management principles and techniques.
- Practical experience through hands-on exercises.
- Strong analytical and problem-solving skills.
- Application of best practices in portfolio management.
- Innovation in understanding and managing investment portfolios.

SKILLS LEARNED

- **Quantitative Methods:** Techniques for quantitative analysis in portfolio management.
- **Financial Statement Analysis:** Analyzing financial statements to make informed investment decisions.
- **Corporate Finance:** Understanding corporate finance principles and their impact on portfolio management.
- **Fixed Income Analysis:** Techniques for analyzing fixed income securities.
- **Equity Analysis:** Understanding and analyzing equity investments.
- **Fiduciary Responsibility:** Managing investment portfolios with a focus on fiduciary duty.
- **Derivatives:** Understanding and utilizing derivative instruments in portfolio management.
- **Portfolio Management:** Comprehensive strategies for managing investment portfolios.
- **Ethics:** Applying ethical standards and professional conduct in portfolio management.
- **Strategic Thinking:** Developing and implementing strategic financial initiatives.
- **Decision-Making:** Making informed decisions based on portfolio analysis.
- **Communication Skills:** Enhancing communication and interpersonal skills in portfolio management contexts.



Program Outline

Required Core Modules

Module 1: Introduction to Portfolio Management

- Basics of portfolio management and its importance.

Module 2: Quantitative Methods I

- Techniques for quantitative analysis in portfolio management.

Module 3: Quantitative Methods II

- Advanced quantitative analysis techniques.

Module 4: Financial Statement Analysis I

- Analyzing financial statements to make informed investment decisions.

Module 5: Financial Statement Analysis II

- Advanced financial statement analysis techniques.

Module 6: Corporate Finance I

- Understanding corporate finance principles and their impact on portfolio management.

Module 7: Corporate Finance II

- Advanced corporate finance techniques.

Module 8: Fixed Income Analysis I

- Techniques for analyzing fixed income securities.

Module 9: Fixed Income Analysis II

- Advanced fixed income analysis techniques.

Module 10: Equity Analysis I

- Understanding and analyzing equity investments.

Module 11: Equity Analysis II

- Advanced equity analysis techniques.

Module 12: Fiduciary Responsibility I

- Managing investment portfolios with a focus on fiduciary duty.

Module 13: Fiduciary Responsibility II

- Advanced fiduciary responsibility techniques.

Module 14: Derivatives I

- Understanding and utilizing derivative instruments in portfolio management.

Module 15: Derivatives II

- Advanced derivative analysis techniques.

Module 16: Portfolio Management I

- Comprehensive strategies for managing investment portfolios.



Program Outline

Enrollment Now Open!

Take the first step towards mastering portfolio management and earning your CPM credential. Enroll in our Certified Portfolio Manager (CPM) Program and enhance your career with Chools.