

INVESTMENTS - FUNDAMENTALS OF PERFORMANCE EVALUATION PROGRAM



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Introduction to Investments

Imagine being able to expertly navigate the world of investments, understanding risk-return tradeoffs, portfolio optimization, security pricing, market efficiency, and firm valuation. The Investments - Fundamentals of Performance Evaluation course offers a deep dive into these principles and applications of investment finance. You'll explore various models and techniques to evaluate the performance of securities and portfolios, including the Capital Asset Pricing Model (CAPM) and multi-factor models, with a strong emphasis on real-world examples and applications using Excel.



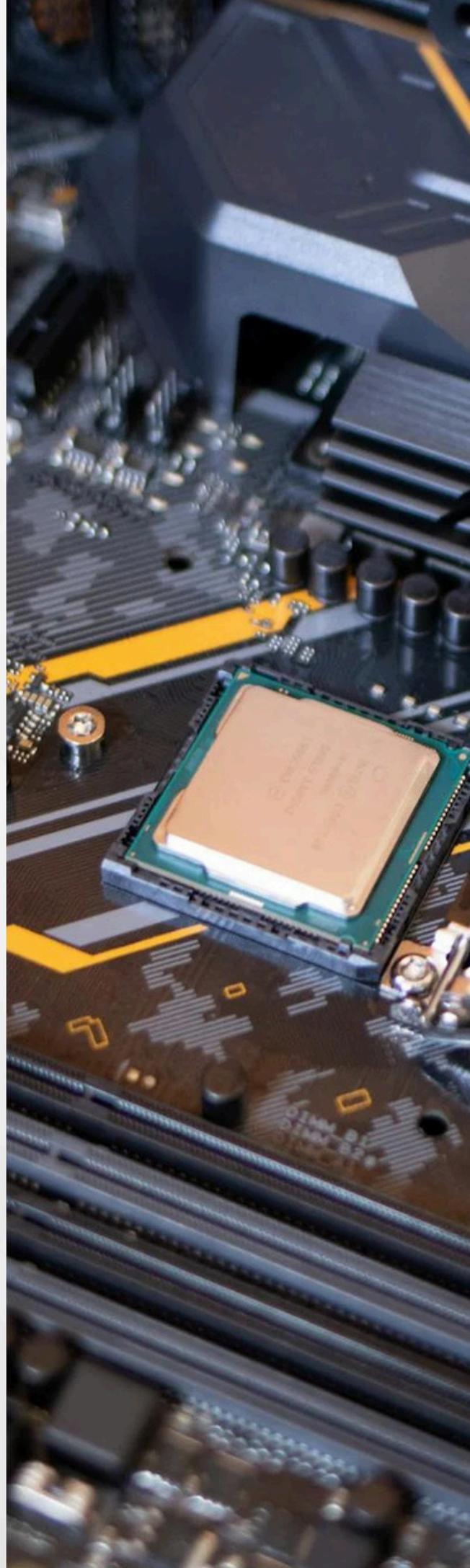
- Basic or intermediate knowledge of investments, such as the types, characteristics, and valuation methods of various securities and portfolios.
- Ability to commit to the course duration, workload, and assessment requirements, which may vary depending on the course provider and level of difficulty.

Program Overview

The FP&A Cash Flow Forecast Model Program provides a comprehensive education in creating and analyzing monthly cash flow forecast models. 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

- Understand the principles of investment finance.
- Learn about risk-return tradeoffs, portfolio optimization, and security pricing.
- Master the Capital Asset Pricing Model (CAPM) and multi-factor models.
- Apply real-world examples and techniques using Excel.
- Prepare for advanced roles in finance and investment analysis.
- Foster continuous learning and personal growth.
- Encourage teamwork and collaboration.

EXPECTED OUTCOMES

- Proficiency in investment finance principles and techniques.
- Practical experience through hands-on exercises and projects.
- Strong analytical and problem-solving skills.
- Application of best practices in investment analysis.
- Innovation in understanding and managing investment performance.

SKILLS LEARNED

- **Risk-Return Tradeoffs:** Understanding and applying risk-return tradeoff principles.
- **Portfolio Optimization:** Techniques for optimizing investment portfolios.
- **Security Pricing:** Methods for pricing various types of securities.
- **Market Efficiency:** Understanding and applying market efficiency concepts.
- **Firm Valuation:** Techniques for valuating firms.
- **Capital Asset Pricing Model (CAPM):** Utilizing CAPM in investment analysis.
- **Multi-Factor Models:** Applying multi-factor models in performance evaluation.
- **Using Excel for Investment Analysis:** Utilizing Excel for financial modeling and analysis.
- **Strategic Thinking:** Developing and implementing strategic investment initiatives.
- **Decision-Making:** Making informed decisions based on investment analysis.
- **Communication Skills:** Enhancing communication and interpersonal skills in investment contexts.



Program Outline

Required Core Modules

Module 1: Introduction to Investment Finance

- Basics of investment finance and its importance.

Module 2: Risk-Return Tradeoffs I

- Understanding and applying risk-return tradeoff principles.

Module 3: Portfolio Optimization I

- Techniques for optimizing investment portfolios.

Module 4: Portfolio Optimization II

- Advanced portfolio optimization strategies.

Module 5: Security Pricing I

- Methods for pricing various types of securities.

Module 6: Security Pricing II

- Advanced security pricing techniques.

Module 7: Market Efficiency I

- Understanding and applying market efficiency concepts.

Module 8: Market Efficiency II

- Advanced market efficiency strategies.

Module 9: Firm Valuation I

- Techniques for valuating firms.

Module 10: Firm Valuation II

- Advanced firm valuation methods.

Module 11: Capital Asset Pricing Model (CAPM) I

- Utilizing CAPM in investment analysis.

Module 12: Capital Asset Pricing Model (CAPM) II

- Advanced CAPM strategies.

Module 13: Multi-Factor Models I

- Applying multi-factor models in performance evaluation.

Module 14: Multi-Factor Models II

- Advanced multi-factor model techniques.

Module 15: Using Excel for Investment Analysis I

- Utilizing Excel for financial modeling and analysis.

Module 16: Using Excel for Investment Analysis II

1. Advanced Excel techniques for investment analysis.



Program Outline

Module 17: Strategic Investment Management I

- Developing and implementing strategic investment initiatives.

Module 18: Strategic Investment Management II

- Advanced strategies for investment management.

Module 19: Decision-Making I

- Making informed decisions based on investment analysis.

Module 20: Communication Skills I

- Enhancing communication and interpersonal skills in investment contexts.

Enrollment Now Open!

Take the first step towards mastering investment finance and enhancing your career prospects. Enroll in our **Investments - Fundamentals of Performance Evaluation** Program and elevate your career with Chools.