THE MALAYSIAN INSURANCE INSTITUTE

TRAINING PROGRAMME - LIFE

Assets and Investment Management

11-12 November 2019


Key Learning Outcome

At the end of the program, participants should be able to:

- Understand the purpose of investment/asset management
- Understand the Fundamentals of Economics
- Outline the Various Factors Affecting Investment Markets
- Understand the make-up and inter-relationship of various investment markets
- Discriminate the key factors to consider in asset/investment management
- Distinguish the various types of asset/investment classes
- Appraise the concept of portfolio theory underlying asset & investment management
- Apply investment concepts learned into actual practice

Key Learning Objectives

1. Recognise and Outline purpose of Investment Asset Management
2. Review and Explain Economic Principles
3. List and distinguish the effects of various Economic factors Driving the Investment Markets
4. Compare & Contrast various investment markets and Explain how each market relates to one another
5. Identify and appraise the key factors driving performance in asset/ investment management
6. Identify and distinguish between different asset/investment classes
7. Evaluate Modern Portfolio Theory & its applications in Investment Management
8. Relate the application of concepts learned in real life via case scenarios.

Key Contents

1. Introduction to Basic Concepts
2. Economic Fundamentals
3. Interest Rates & Other Economic Factors
4. Investment Markets
5. Investment Objectives, Risk & Return
6. Various Investment Asset Types
7. Modern Portfolio Theory
8. Case Study 1, 2 and 3
9. Case Study 4, 5 and 6

Target Audience

Department Heads, Administration, Investment and Marketing Staff, Brokers, Agents and Clients of an institution involved in the marketing, management and administration of investment products.

Trainer's Profile

JEFFEREY ZAIN

Jefferey Zain has 20 years of experience in the Malaysian financial services and insurance industry. He is a Fellow of the Society of Actuaries in North America besides holding the Certified Financial Planner (CFP) designation. He holds a Bachelors Degree in Actuarial Science and a Masters degree in Business Administration (Finance) from St John's University (formerly known as the College of Insurance), New York City.

He first served with Bank Negara Malaysia in the Insurance Regulation Department before joining a leading local insurance company as actuarial manager and subsequently rising to Assistant general Manager heading the Actuarial Department which covered all aspects of a actuarial work including product design, financial reporting, and asset liability management.

He has since established an actuarial consulting practice of which he is the principal consultant. Mr. Zain is currently the Appointed Actuary to two Takaful operators in Malaysia. He has also served as an occasional lecturer with the PNB Investment Institute, the Malaysian Insurance Institute and two local universities for the past 7 years.

Date	11-12 November 2019
Closing Date	22 October 2019
Time | Duration	9 am - 5 pm | 2 Days
Price	MII Member : RM 955 (single), RM 900 (Group) Non Member : RM 1170 (Single), RM 1110 (Group) International: USD300 (Single), USD280 (Group) **(HRDF Claimable)** *** Subject to HRDF Conditions** *** Price is inclusive of 6% SST**
Level	Foundation
Venue	**THE MALAYSIAN INSURANCE INSTITUTE** MII City Centre, Suite 6.0W, Level 6 Wisma FGV, Jalan Raja Laut, 50350 Kuala Lumpur

REGISTRATION POLICY & DECLARATION

- Registration can be done via online at www.mii4u.org/ilms/user/login. (*Group Registration : Minimum 3 participants and above)
- MII practices a non credit policy. As such, all companies and individuals are required to make payment before the commencement of the course. But confirmation for places is subject to availability of seat.
- MII reserves the right to reschedule, change the trainer, modify the course content or cancel the course due to unforeseen circumstances without prior notice.
- Contact person or participants will be notified through the email, fax or phone on the status of the course.
- Any cancellation(s) received within 5 working days before commencement date of the course is not allowed and an administration fee of RM530 or USD250 will be charged for each participant. However, replacement of participant(s) is accepted.

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