

Private Banking

General objectives:

This course aims to provide participants knowledge about the financial situation in order to facilitate proper management of personal finances.

Specific objectives:

At the end of the course, professionals are able to:

- Understand the role of the financial system within the real economy;
- Identify and recognize the key players in the financial system blocks;
- Request information, analyze critically and make informed decisions in the face of reality and personal needs;
- Protect yourself from traps and identify potential investment opportunities.

Target Audience:

This course is intended for all professionals who want to know the real side of the financial world.

Hours:

18 hours.

Program Contents:

Module I - CONCEPTS

- Economic and Financial Concepts base
- Supply and demand

- Monetary policy
- Interest rate
- Interest Concept compound
- Financial Markets - What are they and what are they for?

Module II - REGULATORS

- supervisory authorities of financial intermediation activities
- Portugal's bank
- CMVM
- Key changes introduced by MiFID - Directive on Financial Instruments Markets

Module III - FINANCIAL INSTRUMENTS - INTRODUCTION

- What are they and what are they for?
- What it is Fundamental Analysis and Technical Analysis
- What they are and how they can be applied in practice
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Module IV - FINANCIAL INSTRUMENTS - SHARES AND BONDS

- Actions
- Features / Assessment Methods / Markets
- Obligations
- Features / Assessment Methods / Markets

Module V - FINANCIAL INSTRUMENTS - ALTERNATIVES

- Investment Funds, Securities and Real Estate
- Venture Capital Funds
- Alternative Investments
- Derivatives and Related

Module VI - RISK

- Concept
- Risk Types
- Metrics Risk
- Risk and investment decisions?
- The risk profile

Module VII – TAXATION

- What is?
- What is the impact on the investment decision?

Module VIII - STRAND FAMILY

- The importance of a code of conduct in the family business.
- How to determine what family is and what is professional - risks and opportunities.

Module IX - ASSET MANAGEMENT

- What is a Portfolio or an Investment Portfolio
- Investment Profile
- Definition of investment objectives
- Portfolio Construction Methods
- Control Methods and assessment Portfolios
- Investment Strategies

Module X - ASSET ALLOCATION STRATEGIES

- How to use and evaluate the various financial instruments

- Investment Strategies
- Investment in Multi-asset
- Diversification - the role of investments in alternative asset classes.