

A background image showing two men in business suits sitting at a table. One man is holding a tablet and looking at it, while the other is looking towards him. The image is overlaid with a semi-transparent blue filter.

Asset Management Essentials

Expand your expertise. Advance your career.

Asset management essentials is a concentrated curriculum of interactive, online courses designed for both financial services companies and their clients. Tools and techniques from evaluating asset classes to understanding investment management strategies and risk management enhance expertise in the multiple facets of the ever-changing financial services industry and dynamic global economy.

Asset Management Essentials

Introduction to Asset Management

- Portfolio Risk
- Integrated Asset Allocation
- Portfolio Management
- Final Test

Alternative Investments

- Introduction
- Real Assets
- Equity Investments
- Alternative Financial Investments
- Discussing Alternative Investments With Your Clients
- Final Test

Asset Allocation

- Margin Analysis
- Interest Income / Expense and other Income
- Taxation and the Income Statement
- The Timing of Tax Payments
- Final Test

Asset Classes

- Introduction
- Type of Asset Classes
- Diversification and Asset Allocation
- Conclusion
- Final Test

Exchange-Traded Funds (ETFs)

- What is an ETF?
- Characteristics
- ETF vs. Mutual Funds
- ETFs in your Portfolio
- Investing in ETFs
- The Creation and Redemption Process
- Bid/Ask Spreads
- Buying and selling ETFs
- Final Test

Exchange-Traded Funds - Types

- Creation and Redemption Mechanism
- Passive Management
- Active Management
- Understanding ETF Arbitrage
- Final Test

Introduction to Commodities

- Introduction
- The Structure of Commodity Markets
- Conclusion
- Final Test

Introduction to Securities Markets

- Securities Markets
- Debt
- Equity
- Final Test

Investment Principles

- Why Be Invested?
- Risk
- Return
- Time
- Time-Related Strategies
- Diversification
- Final Test

Mutual Funds

- Introduction
- Key Concepts
- Front-End Operations
- Bad-End Operations
- Final Test

Life of a Trade: Global

- Introduction
- International Trade Initiation and Matching
- Securities and Funds Settlement
- Risk Management
- Final Test

Annuities and Perpetuities

- Introduction to Interest Rates
- Future Value
- Present Value
- Annuities
- Perpetuities
- Final Test