Up to 70% Subsidies

Accredited by the Institute of Banking and Finance (IBF)

Top Trainers who are Veterans in their Fields

Intelligent Investing in the Era of Disruption

Learn Good Investing Practices and Identify Promising Companies to Invest In

Course Overview

Strengthen your investment portfolio with this comprehensive 24-hour course, now enhanced with cutting-edge AI tools. Combine timeless value-investing principles with an understanding of current investible megatrends and leverage advanced AI analytics to refine your investment strategies. By applying concepts like key financial ratios and revenue models to real-life companies and case studies, you will use AI-driven insights to identify high-quality, high-growth opportunities. Upon completion, continue to benefit from ongoing support through an alumni community, where AI-powered tools and expert guidance from trainers and fellow learners will help keep your investment skills sharp and adaptive to market changes.

Course Highlight (Learning)

- **Fundamentals of Investing** – Apply tested value investing principles to the current market with AI-enhanced insights for better decision-making.
- **Understand Revenue Models** – Use AI to analyze and visualize a company's revenue model, gaining a clear picture of its business nature before investing.
- **Pick the Right Companies –** Understand the growth drivers which make stocks into trustworthy and competitive investments
- **Buy Low, Sell High –** Learn how to determine a stock's true value and avoid overpaying for it
- **Invest Wisely with Financial Ratios** – AI-powered tools streamline financial ratio calculations, providing a fast and dependable checklist to identify high-performance, quality companies and facilitate comparisons with industry peers.
- **Build Your Portfolio** – Learn from real-life case studies of actual companies to identify structural winners to invest in.

Modes of delivery: Face-to-Face Class

Duration: 24 Hours

Course Outline

Course Ref. No.:
TGS-2022600609

1.Understand How Businesses Generate Revenue

- Types of Revenue Models
- Business Natures
- Revenue Recognition and Accrual

2.Evaluate Competitive Advantages of a Business

- Types of competitive advantage
- Porter's Five Forces

3.Understand Growth Drivers to Project Future of a Business

- Growth Drivers
- Identifying Potential Risks

4.Assess the Cash Flow Quality of a Business

- Types of Cash Flow
- Cash Flow Quality & Analysis

5.Understand Key Financial Ratios and Applications

- Profitability Analysis
- Leverage Analysis
- Dividend Analysis

6.Is this Business Suitable for Investment?

- Projection of future revenue, net profit and cash flow
- Compute the Valuation of the Business

Available Schedules:

Weekend: 3 full days, 9am-6pm

Course Developer

James Yeo

- More than 10 years' experience in the Financial & Asset Management Industry
- Well-versed in different financial instruments like Stocks, Bonds, Swaps, FX Options
- Crafted an investment workshop and coached over 50 students to date
- Articulate in numbers and Proactive to seek better solutions.

Audience/Pre-requisites

Audience:

- Beginner to intermediate investors
- Financial consultants
- Entrepreneurs and business owners
- Traders
- Newcomers or Manager/Supervisor in the Financial Industry
- Industry practitioners
- Mid-level staff who is seeking employment in Financial Industry

Pre-requisites:

- Basic English skills (reading and writing)
- Basic computer skills (download in g files, using zoom etc)
- No prior investing knowledge is required, but learners who are comfortable with numbers and calculations might find the material and assessments easier to grasp

Training Provider

Wealth Design Studio

Wealth Design Studio

Wealth Design Studio is a learning platform where we encourage individuals from all walks of life to invest in themselves and their future.

This course has been accredited under the Skills Framework for Financial Services and is eligible for funding under the IBF Standards Training Scheme (IBF-STS), subject to all eligibility criteria being met.
Participants are advised to assess the suitability of the course and its relevance to his/her business activities or job roles.

The IBF-STS is available to eligible entities and individuals based on the prevalent funding eligibility, quantum and caps. IBF-STS provides up to 70% course fee subsidy support for direct training costs subject to a cap of S3,000 per candidate per course subject to all eligibility criteria being met.

Course Fees & Fundings

Full Course Fee: $1,400

Singaporeans Age 40 & Above	After Course Fee Subsidies: $420.00
Singaporeans Age 21-39 & PRs	After Course Fee Subsidies: $700.00

Up to 70% Subsidies Support

- Singapore Citizens aged 40 years old and above will be eligible for 70% co-funding of direct training costs.
- Singapore Citizens 21-39 years old and PR will be eligible for 50% subsidy

FAQs

1. When do courses take place?
Classes take place over a period of 3 days, from 9am-6pm. Check the Course Schedule for more information.

2. How are lessons conducted? Are there in-person lessons?
At this time, lessons are conducted solely in-person. As our classroom venue varies per intake, please contact us for the venue of upcoming classes. Upon Registration, an email with the class venue will be sent to you as well.

3. Do I need investing experience to join this course?
No, this course is aimed at beginners, and welcomes learners of all levels of knowledge

About IBF Certification
This course addresses the following Technical Skills and Competencies (TSCs) and proficiency level:

- Financial Analysis (Level 4)

Participants are encouraged to access the IBF MySkills Portfolio (https://www.ibf.org.sg/home/for-individuals/resource-tools/myskills-portfolio) to track their training progress and skills acquisition against the Skills Framework for Financial Services. You can apply for IBF Certification after fulfilling the required number of Technical Skills and Competencies (TSCs) for the selected job role.

Find out more about IBF certification and the application process on https://www.ibf.org.sg/home/for-individuals/ibf-certification/why-be-ibf-certified