



# 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. Combine knowledge of timeless value-investing principles with an understanding of the investible megatrends of the current era. By applying concepts like key financial ratios and revenue models to real-life companies and case studies, learners will be able to identify high-quality and high-growth companies to invest in. On completion of the course, learners will continue to be supported through an alumni community, where trainers and fellow learners will help keep their investment skills sharpened.



## Course Highlight (Learning)

- **Fundamentals of Investing** - Apply tested value investing principles to the current market
- **Understand Revenue Models** - Gain a clear picture of a company's business nature and revenue model before choosing to invest
- **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** - Financial ratios offer a quick and reliable checklist to identify the highest performance and quality companies
- **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 Reference No.:  
TGS-2024042913

## 1. Deeper Understanding of Businesses using AI Insights

## 2. Economic Moats in the Age of AI

## 3. Navigating Growth with AI Predictions

## 4. Cash Flow Analysis - The Life Blood of a Business

## 5. Decoding Financial Ratios with AI Prowess

## 6. Determine if Business is Suitable for Investment

- Discover and explore how AI can spot disruptive trends
- Flag out potential anomalies in revenue streams
- Using AI to analyze vast amount of data to assess strength of company's moat
- Uncover hidden competitive advantages or potential vulnerabilities
- Showcase predictive algorithms to project growth trajectories to help make informed decisions
- Leverage on AI to assess cash flow quality and identity potential concerns of the business
- Save time by utilizing AI to derive financial ratios calculations and making comparison to industry peers
- Incorporate AI-driven valuation models to estimate business worth based on multiple scenarios and variables



## 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 (downloading 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-STTS), 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-STTS is available to eligible entities and individuals based on the prevalent funding eligibility, quantum and caps. IBF-STTS provides up to 70% course fee subsidy support for direct training costs subject to a cap of S\$3,000 per candidate per course subject to all eligibility criteria being met.

# FAQs



## Course Fees & Fundings

Full Course Fee: \$1,526.00 (GST Inclusive)  
Individual Sponsored

Singaporeans Age 40 & Above	After Course Fee Subsidies: \$546.00
Singaporeans Age 21-39 & PRs	After Course Fee Subsidies: \$826.00

## 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
- \* Price before GST

## SkillsFuture Credit Eligible

- Singaporeans may use their SkillsFuture Credits to offset remaining post-subsidy

### 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.

### 4. 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>