GLOBAL FINANCIAL MARKETS, ASSET CLASSES & INVESTMENT FUNDAMENTALS



GENTEX®
TRAINING CENTER

GENTEX Training Center LLC | Orlando - FL, USA
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Introduction

Global Financial Markets, Asset Classes & Investment Fundamentals Training Course gives professionals a structured understanding of how financial markets operate and how investments are selected, valued and managed. Participants learn how equities, fixed income, currencies, commodities and alternative assets behave, and what drives their returns. The programme covers market participants, trading venues, yield curves, valuation metrics, portfolio construction and risk measurement. Furthermore, it explains the macro forces, central bank policy and benchmarks that shape market conditions worldwide. As a result, delegates can interpret market data, evaluate investment proposals and discuss portfolio strategy with confidence. Gentex Training Center delivers the programme through data workshops and investment case work.

Global Financial Markets, Asset Classes & Investment Fundamentals Course Objectives

- Explain the structure and function of global financial markets and trading venues.
- Distinguish the main asset classes and their risk and return characteristics.
- Interpret yield curves, credit spreads, equity multiples and commodity pricing.
- Analyse the role of central banks, interest rates and inflation in market cycles.
- Apply fundamental and relative valuation approaches to listed securities.
- Evaluate portfolio construction, diversification and asset allocation principles.
- Measure risk and return using standard deviation, beta and correlation.
- Apply performance metrics including Sharpe ratio, alpha and tracking error.
- Assess liquidity, currency and counterparty risk in cross-border investments.
- Build an investment case and present it clearly to an investment committee.

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Course Methodology

The course combines concise market briefings with hands-on data workshops and investment case exercises. Participants analyse live market data, build comparisons across asset classes and construct simple portfolio illustrations in Excel. In addition, structured peer review and group debate sharpen investment judgement, and every day closes with an applied market or portfolio task.

Who Should Take This Course

- Investment analysts, portfolio assistants and research staff.
- Banking, wealth management and private banking professionals.
- Treasury, funding and asset-liability management staff.
- Corporate finance and investor relations professionals.
- Pension, endowment and sovereign fund administrators.
- Consultants, auditors and advisers serving financial sector clients.

Global Financial Markets, Asset Classes & Investment Fundamentals Course Outlines

Day 1: Market Structure and Participants

- Functions of financial markets: capital raising, liquidity and price discovery.
- Exchange-traded versus over-the-counter markets.
- Market participants: issuers, investors, dealers, brokers and regulators.
- Primary and secondary market activity, listings and IPOs.
- Indices, benchmarks and their construction.

- Market infrastructure: clearing, settlement and custody.
- Workshop: mapping a trade from execution to settlement.

Day 2: Asset Classes and Their Characteristics

- Equities: types, dividend policy and shareholder rights.
- Fixed income: government, corporate and sukuk instruments.
- Money markets, deposits and short-term instruments.
- Foreign exchange and currency exposure.
- Commodities, real estate and alternative investments.
- Risk and return profiles and correlation between asset classes.
- Workshop: comparing asset class returns and risk over a market cycle.

Day 3: Valuation and Fundamental Analysis

- Macro drivers: growth, inflation, interest rates and central bank policy.
- Yield curve shapes and what they signal about the economy.
- Credit ratings, credit spreads and default risk.
- Equity valuation using price-earnings, EV/EBITDA and dividend yield.
- Discounted cash flow valuation and cost of equity.
- Relative valuation and peer group benchmarking.
- Workshop: valuing a listed company and comparing it with peers.

Day 4: Portfolio Construction and Risk Management

- Asset allocation: strategic, tactical and rebalancing approaches.
- Diversification, correlation and the efficient frontier concept.
- Portfolio risk measurement using standard deviation and beta.

- Performance measurement: Sharpe ratio, alpha, tracking error and drawdown.
- Liquidity, currency and counterparty risk management.
- Investment policy statements and mandate design.
- Workshop: building a simple multi-asset portfolio illustration.

Day 5: Investment Process and Committee Decision

- Investment research process and idea generation.
- Screening, due diligence and manager selection.
- Preparing investment proposals and committee papers.
- Presenting risk, return and scenario analysis clearly.
- Monitoring portfolios and reviewing performance against benchmarks.
- Regulatory and governance expectations in investment management.
- Workshop: presenting an investment case before a review panel.

Conclusion

By successfully completing Global Financial Markets, Asset Classes & Investment Fundamentals Training Course, participants will have acquired the knowledge to interpret global markets and evaluate investments across asset classes. They will understand market structure, valuation, portfolio construction, risk measurement and investment governance, and they will know how to build and present a clear investment case. As a result, delegates contribute more confidently to investment decisions. Gentex Training Center builds the programme around current market practice.

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FAQs for the Global Financial Markets, Asset Classes & Investment Fundamentals course

Q1 What is the "Global Financial Markets, Asset Classes & Investment Fundamentals" course about?

It explains how global financial markets work and how investments are valued and managed. You cover asset classes, yield curves, valuation methods, portfolio construction and risk measurement, then apply them to live market data and investment cases.

Q2 What are the key benefits of the "Global Financial Markets, Asset Classes & Investment Fundamentals" course?

You gain the ability to read market data and question valuations rather than accepting them. You also build stronger investment proposals, understand risk and diversification better, and communicate portfolio decisions clearly to committees and clients.

Q3 What skills will I gain from the "Global Financial Markets, Asset Classes & Investment Fundamentals" course?

You will gain global market and asset class analysis, security valuation and fundamental analysis, portfolio construction and asset allocation, and risk measurement and investment performance analysis.

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Q4 What tools, methods, or standards are covered in the "Global Financial Markets, Asset Classes & Investment Fundamentals" course?

The course covers yield curve and credit spread analysis, equity valuation using price-earnings, EV/EBITDA and dividend yield, discounted cash flow valuation, benchmark and index analysis, portfolio risk measurement using standard deviation, beta and correlation, performance metrics including Sharpe ratio, alpha and tracking error, and investment policy statement design.

Q5 How is the "Global Financial Markets, Asset Classes & Investment Fundamentals" course applied in real-world practice?

Graduates apply it to prepare investment proposals and committee papers, assess asset allocation for portfolios or funds, review manager and security valuations, monitor performance against benchmarks, and explain market and portfolio risk to clients, boards and investment committees.