Claritas Prep Pro
For CFA’s Claritas Investment Certificate

From 1 June, 2014 in Abu Dhabi
From 3 September, 2014 in Dubai
Sundays and Wednesdays (18:30 - 21:30)

This two-month course will prepare participants for the Claritas Investment Certificate examination.

The Claritas Investment Certificate is a new global certification offered by the CFA Institute. The goal of the Claritas Investment Certificate program is to provide a fundamental understanding of the essential aspects of the investment industry. The certificate is awarded by the CFA Institute to candidates who pass the Claritas exam.

WHO SHOULD ATTEND?
This Claritas program is ideal for anyone working in financial services who seeks a clear understanding of the investment industry and their professional responsibilities within it. The program promotes a shared understanding of the industry, builds employee confidence, and raises effectiveness across all professional disciplines involved with it, outside of investment roles; from client services to compliance; from human resources to IT and operations; and from sales and marketing to legal and administrative services.
COURSE OUTLINE

The course consists of 21 chapters, organized into seven modules.

MODULE 1: OVERVIEW
It is about getting to the heart and the core purpose of the investment industry – its vital role in the world: from helping people save for the future to funding schools, hospitals, roads and other essentials. The benefits this brings when done well (ethically and all parts working together) help serve society.

> CHAPTER 1 The Investment Industry: A Top-Down View

MODULE 2: ETHICS AND REGULATION
This module focuses on the essential foundations for the investment world – ethics and regulation. The firm ground on which we build for our clients: trust, reputation, confidence and value – the essentials of a strong and healthy client-focused industry.

> CHAPTER 2 Ethics and Investment Professionalism
> CHAPTER 3 Regulation and Supervision

MODULE 3: TOOLS AND INPUTS
This is about understanding how the (economic) world works - the big picture and the fine detail. How the actions of individuals, corporations and governments play out at micro, macro and international levels, how this translates to a company’s finances, and how to get a clearer understanding of what this all means.

> CHAPTER 4 Microeconomics
> CHAPTER 5 Macroeconomics
> CHAPTER 6 International Trade and Foreign Exchange
> CHAPTER 7 Financial Statements
> CHAPTER 8 Quantitative Concepts

MODULE 4: INVESTMENT INSTRUMENTS
This module covers the basic investment options, what they are and their purpose - from conventional equities and bonds to more specialized investments such as real estate and derivatives.

> CHAPTER 9 Equity Securities
> CHAPTER 10 Debt Securities
> CHAPTER 11 Derivatives
> CHAPTER 12 Alternative Investments

MODULE 5: INDUSTRY STRUCTURE
The industry is complex and highly interdependent. This module looks at how the industry helps us invest, who the participants are and what they do, the different markets where investments take place, and the investment products themselves.

> CHAPTER 13 Structure of the Investment Industry
> CHAPTER 14 Investment Vehicles and Structures
> CHAPTER 15 Investment Market Characteristics

MODULE 6: INDUSTRY CONTROLS
Controls are critical in helping ensure everything runs smoothly. In the fast moving world of investments and risk it is essential to understand how systems and controls are used in the industry to ensure the client is properly served.

> CHAPTER 16 Risk Management
> CHAPTER 17 Performance Evaluation
> CHAPTER 18 Investment Industry Documentation

MODULE 7: SERVING CLIENT NEEDS
This is about focusing on clients – gaining a clear understanding of their needs, circumstances, motivations and ambitions so investments can be allocated and managed in the right way for them.

> CHAPTER 19 Investor Needs and Investment Policy
> CHAPTER 20 Asset Allocation
> CHAPTER 21 Active and Passive Investment Management
Hamad Aslam
Senior Manager and Trainer – Genesis Institute

Hamad Aslam has over seven years of work experience in equity research, economic analysis, portfolio management and investment advisory. Before joining Genesis Institute, Hamad headed the research function at Lakson Investments, Pakistan’s largest independent asset management company. He played an active role in investment allocation decisions for mutual funds and portfolios invested in the equity, debt, and commodity markets in Pakistan and globally. Earlier Hamad headed sell-side research for BMA Capital, Abraaj Capital’s portfolio company in Pakistan. He was instrumental in attracting foreign investment in Pakistan’s capital markets and led various initiatives including Pakistan Day held at the London Stock Exchange in 2010.

He has a Bachelor of Science (Honours) degree in Accounting and Finance and is a CFA charterholder.

Yasir Ali, ACCA, CIMA, FRM, CFA
Senior Manager and Trainer – Genesis Institute

Yasir Ali is a finance professional with over 14 years of experience, including 10 years of teaching experience. He has worked across multiple industries, advising the implementation of Foreign Investment Appraisal, Risk Management, preparing financial models, etc.

Yasir has been teaching ACCA, CFA, CIMA and FRM courses since 2001. He brings to the class a mix of valuable regional financial expertise backed by excellent professional qualifications.

PREREQUISITES
There is no education or experience requirement; however, candidates should feel comfortable with the English language.

COURSE REGISTRATION TERMS & CONDITIONS
Course Fee: AED 5,000 per person

Early Bird Discount*
A 10% discount off standard course fees is available when you register and pre-pay at least two weeks prior to the scheduled start date of the course.

Group Discount*
A 10% discount off standard course fees is available when two or more individuals from the same organization register.

Student Discount*
A special 20% discount for university students.
*This offer cannot be used in conjunction with any other discounts.

For details please call
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Genesis Institute: 800 346 (toll free) or send an email to info@genesisreview.com

Pre-payment is required for all enrolments. For cancellations received (in writing by email or fax):
» 15 days before the course start date there will be no cancellation charges.
» 8 to 14 days before the course start date, 50% of the course fee will be charged.
» 7 days before the course start date, 100% of the course fee will be charged.

Another delegate from the same company may substitute in the place of the primary delegate should the need arise.

EXAM REGISTRATION AND FEES
Exam Registration Fee: US$ 685 per person
Includes access to all study materials (the eBook, practice assessments, a mock exam), and one exam sitting.
Candidates can register for the exam directly with the CFA Institute on their website www.cfainstitute.org. The multiple choice, computer-based exam is offered at test centers around the world.

ABOUT THE FACULTY

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