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Online  
Training



# Certified Stock Exchange Professional

Master the Stock Exchange!

Learn trading strategies and make informed  
investment decisions.



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## What you will get from the course

1. Understanding market trends and analytics
2. Develop a strong investment portfolio
3. Gain confidence to trade with real-world strategies



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Stock exchange's play an important role in the economy by serving as the anchor of the modern national economic system. In countries around the world, stock exchanges are being used to help businesses raise capital and give investors opportunities to back new and established enterprises. There is no geographical limit or bias to the stock market which means that individuals from a diverse array of countries can use stock markets to build wealth and invest responsibility. By any standard of measure, the functionality and utility of the stock market is universal. This highly interactive 5-days training workshop has been specifically designed for participants from the financial industry as an introduction to Stock Exchange.



## Course Overview

### 5 Days Online Training

## Key Benefits:

### ■ Industry-Recognized Certification:

Earn a certification that showcases your expertise in stock trading and market analysis.

### ■ Expert-Led Instruction:

Learn from seasoned professionals with extensive experience in stock exchanges and financial markets.

### ■ Hands-On Learning:

Apply your knowledge through live simulations and trading exercises, mirroring real-world market conditions.

### ■ Comprehensive Coverage:

Master topics like fundamental and technical analysis, market trends, and investment strategies to boost your financial acumen.

## Who Should Take This Course?

- Aspiring Traders
- Finance Professionals
- Investment Advisors
- Entrepreneurs and Business Owners
- Experienced Investors



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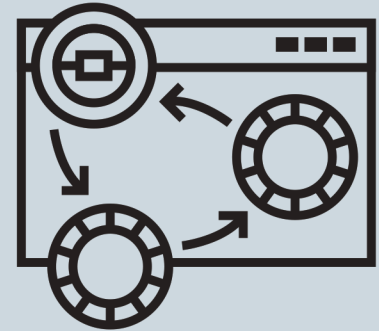


# Certified Stock Exchange Professional

## Day 1: Introduction, the Big Picture

### What is a Stock Exchange?

- A Marketplace where securities are bought and sold.
- Definition of Securities. Basic types of Securities traded.
  - Ordinary Shares
  - Debt Securities, including GILTs and Bonds
  - Exchange Traded Funds'
  - Derivatives and Structured Products
  - Covered Warrants
  - Depository Receipts - GDRs & ADRs



### The Role of the Stock Exchange in the Economy

- Capitalizing Companies / Raising Capital
- Financial Accountability. Investor Protection; servicing Investors: fair & transparent.
- Job Creation (not just in the stock exchange)
- Wealth Creation - an opportunity to share in the profits of a corporations.
- Economy Effects & Indicator of the economy - a barometer of a nations' fiscal health.



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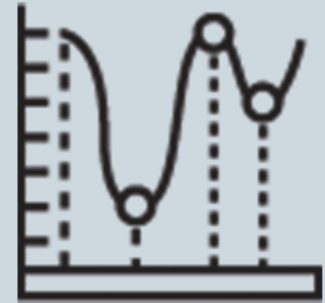


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## Day 1: Introduction, the Big Picture

### History of the Stock Market, that lead to formation of Stock Exchanges

- Early History - The Market
- Establishment of a formal stock Exchange
- Case Study
  - How the Amsterdam market for Dutch East India Company shares became a modern securities market, 1602-1700
  - To understand the key role of a modern securities markets are two functions:
    1. price discovery and the
    2. provision of liquidity.



### The changing landscape of the stock exchange industry

- Establishment of Stock Exchange (ownership Structure)
- Changing landscape (in the developed markets)
- Brief modern history - mergers and Acquisition in the stock exchange industry and revenue structure.

### The role, responsibilities & involvement of the market participants



- The Stock Exchange
- The intermediaries (Brokers)
- The investors



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## Day 1: Introduction, the Big Picture

### Initial Public Offering



- What is an IPO?
- Listing requirements (Example: South Africa or any other country of interest to the participants - pre-training)
- Participants - The Company, Merchant /Investment Banker (also Underwriters), Independent Accountant and Legal Advisors. Their role and responsibilities.

### Alternatives to Stock exchange for Raising Capital (Group Discussion)

- Venture Capital, Debt, Refinancing, JV/Strategic Alliances, Acquisition, Private Placement, Crowdfunding & Selling Asset. Are the banks willing to lend for long-term asset acquisition? Or just short-term financing?

### Increase role of an “Investment Banker”.

#### Key functions of Investment Bank.

- Companies need to raise capital for their operation, growth and expansion. Investment Banks help corporations in:
  - Raising and Investing capital
  - Advising clients on strategic action
  - Other services



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## Day 2:

## How does the market work?

### Two-Ways to Trade on the Stock-Exchange

- Traditional - Outcry on the Stock-Exchange Floor (Hand Signals)
- Modern - electronic exchanges and all occurrences take place in real time online.

### How to get started (Brokerage Firm and Investment Broker)

- The first step is to get an investment broker.
- Role of an “investment broker”.
- Typical steps selecting your “investment broker” (group discussion)
- Top 10 common Securities Fraud. Beware of Brokers trading malpractices



### Understanding the “Stock Ticker”

- A ticker symbol is the grouping of a specific set of characters, that represent and identify any type of public security that trades on an exchange.

### Price at which the stocks are purchased and sold?

- How is the price quoted? What is the “current price”?
- Understanding “Bid” and “Ask” prices relative to the current price.



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## Day 2: How does the market work?

### Understanding Designated Market Maker

- What Is a Designated Market Maker (DMM)?
- Market Makers vs. Floor Brokers



### When can you trade in the Stock Exchange?

- Market Trading Hours
- Pre-and-Post Market Trading Sessions
- Why do we need to trade before or after the markets are closed?  
Activities to take advantage of in Pre-and Post market trading hours.

### Trading Platform

- Cash Account vs. Margin Account: What's the Difference?
- What Is a Margin Call?

### Trading Position

- What is Long Position (just called “Long”)?
- Option Contracts (Call vs Put). Who writes these options?
  - Examples of Long Positions
  - Forward Contracts vs Future Contracts



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## Day 2: How does the market work?

### Main Types of Equity Trading

- Scaping
- Momentum Trading
- Technical Trading
- Fundamental Trading
- Swing Trading
- Understand stop-loss and How to use a stop-loss in trading



### When can you trade in the Stock Exchange?

- Market Trading Hours
- Pre-and-Post Market Trading Sessions
- Why do we need to trade before or after the markets are closed? Activities to take advantage of in Pre-and Post market trading hours.

### Circuit Breakers

- What is circuit breaker? How does it work?



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## Day 2: How does the market work?

### What are the different “Order” types?

There are numerous order types, investors will be able to trade with precision while limiting potential losses. Not all stock exchange offer all types of “order”. The brokerage firm may also impose its own restrictions on the order type. The common order types are:

- Limit Order
- Market Order
- Market-to-Limit Order
- Session State Order
- Price Triggered Order
- Stop Order
- If-touch-Order

#### Execution Conditions and Validity

- Fill-or-Kill (FOK)
- Fill-and-Kill (FAK)
- Day Order
- Long Dated Order - (a) Goof-Till-Date; (b) Good-Till-Maximum



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## Day 2: How does the market work?

### What is Short-Selling?

Short selling in respect of securities is the sale of securities that the seller does not own at the time of the sale.

- Definition of Short-Selling
  - Covered and Uncovered
  - Margin Trading
  - Possible disclosure regulatory requirements. Example SGX (Singapore Stock Exchange)

Are there any Fees?

- Stock Exchange: Trading Fees, Clearing Fees , tax &/or stamp duty.
- Brokerage Firm: Brokerage
- Custodian: Custodian Fees

### Stock Exchange vs OTC

- What is Over-the-Counter?
- OTC Securities
- OTC Contract and Associated Risk
- Importance of OTC derivatives in modern banking
- Why Are Most Bonds Traded on the Secondary Market "OTC"?



### Bull and Bear Markets

- What is Bull Market? What is Bear Market?
- What's the Difference Between a Bull & Bear Market?
- What to Do in Each Market ? (Group Discussions)
- Where Did the Bull and Bear Market Get Their Names?



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## Day 3: Path to “Successful Investing”

### Investing Strategy

- What Is an Investment Strategy?
- Four common investing strategies:
  - Strategy 1: Value Investing
  - Strategy 2: Growth Investing
  - Strategy 3: Momentum Investing
  - Strategy 4: Dollar-Cost Averaging
- Brief discussion on general trading, selective trading, buying cheap and selling dear, long-pull selection and Bargain purchases.
- Investment Strategy and Risk. Risk and Returns go hand-in-hand.
- How to invest in Stocks - The Investment Check-List (Motley Fool)



### The top 25 accounting terms you should know

It's in your best interest to have a working understanding of these basic accounting and business terms and what they mean.

- |                              |                          |
|------------------------------|--------------------------|
| 1. Accounting Period         | 14. Expenses             |
| 2. Accounts Payable (A/P)    | 15. Equity               |
| 3. Accounts Receivable (A/R) | 16. Financial Statements |
| 4. Accrual Accounting        | 17. GAAP                 |
| 5. Asset                     | 18. General Ledger (G/L) |
| 6. Bank Reconciliation       | 19. Gross Profit         |
| 7. Capital                   | 20. Inventory            |
| 8. Cash Accounting           | 21. Journal Entry        |
| 9. Certified Accountant      | 22. Liability            |
| 10. Cost of Goods Sold       | 23. Net Profit/Loss      |
| 11. Credit                   | 24. Overhead             |
| 12. Debit                    | 25. Revenue              |
| 13. Depreciation             |                          |



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# Certified Stock Exchange Professional

## Day 3: Path to “Successful Investing”

### Fundamental Analysis

- What is Fundamental Analysis?
- Why use Fundamental Analysis in Stock Trading?
- Fundamental vs Technical Analysis Which is Better?
- How to Pick Stocks Using Fundamental Analysis
- Financial Ratio

#1 P/E - Price-to-Earnings ratio

#2 ROE - Returns-on-Equity Ratio

#3 PEG - Price-to-earning growth ratio

#4 P/B - Price-to-Book ratio

#5 Debt/Equity - Debt-to-Equity Ratio

#6 Debt to EBITDA

#7 Profit Margins



### Looking beyond the financial numbers to analyze stocks

- Durable competitive advantages
- Quality and Experience of the management
- Industry trends
- Group Discussions - what other aspects will you consider. Internal to the company; external to the company - Industry, Country, etc.



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## Days 4-5: Investment Analysis (optional)

### Introduction: Understanding Investment Security Relationships & Estimating Returns

- Understanding powerful relationships between risk, return, and price.
- Explore the baseline fundamental law of Financial Analysis - The Law of One Price.
- Calculating stock returns for dividend and non-dividend paying stocks, manually.
- Downloading and working with real world data and estimating stock returns on Excel®.

### Estimating Expected Returns

- Estimating expected returns using the average (mean) method.
- Estimating expected returns using 'state contingent weighted probabilities'.
- Estimating expected returns using Asset Pricing Models including the Capital Asset Pricing Model (CAPM).
- You'll learn each approach theoretically AND practically, ensuring you fully understand why the formulas work the way they do, and that you're able to download relevant data and conduct the initial financial analysis by computing expected returns for any stock you want.



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## Days 4-5: Investment Analysis (optional)

### Understanding and Measuring Risk and Relationships

- Estimating the total risk of a stock.
- Estimating the market risk of a stock.
- As a by-product of learning to measure the market risk, you'll also learn how to quantify the relationships between securities - something that will be a focal theme of portfolio management and investment / financial analysis.
- As with the expected returns, you'll learn to measure risk manually as well as on Excel.

### Measuring Portfolio Risk and Return

- Estimating the return of a 2 asset and multi-asset portfolio.
- Measuring the risk of a 2 asset and multi-asset portfolio.
- Discover the 3 factors that influence / impact portfolio risk - 1 of which is more important than the other two combined!

### Exploring Diversification & Optimization

- Risk reduction by diversification.
- Exploring Optimal Diversification - Number of Securities to Hold
- Optimizing portfolio weights to achieve a target expected return.
- Minimizing your portfolio risk (mathematically) using robust financial analysis techniques.



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