

Banking & Finance: Foreign exchange, Precious metals, Commodities, Real estate

Training program SAM

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| Title / Topic | Foreign exchange, Precious metals, Commodities, Real estate |
| Target audience | Asset managers |
| Learning content | <p>In addition to the traditional investments - i.e. in particular investments in interest rate instruments and equity investments - there are a number of other asset classes which complement the investment universe and are of great significance to the customer for reasons of diversification.</p> <p>These include a variety of different investment categories, e.g. precious metals, commodities, and real estate. Furthermore, foreign exchange markets and foreign exchange transactions are also discussed in this context.</p> |
| Learning location / Testing location | Fintelligence Online Lernplattform: https://fintelligence.fintelligence-net.com/ |
| Learning time | <ol style="list-style-type: none"> 1. Foreign exchange market (50 min) 2. Foreign exchange transactions (50 min) 3. Precious metals (50 min) 4. Commodities (50 min) 5. Real estate (40 min) 6. Learning control (70 min) |
| Period | 2 months |
| Learning goals | <p><u>Foreign exchange market</u></p> <p>When you have completed this module, you will</p> <ul style="list-style-type: none"> • know the most important foreign exchange markets and their participants • know about currency quotations and cross rates • understand the basic exchange rate systems • know the most important international currencies and the importance of convertibility of currencies as well as capital movements restrictions <p><u>Foreign exchange transactions</u></p> <p>After completing this module, you will</p> <ul style="list-style-type: none"> • be able to explain the terms spot exchange transactions, forward exchange transactions and swap exchange transactions to a client • know how to calculate forward exchange rates and the swap exchange rates • know about the basic foreign exchange options • be familiar with non-deliverable forwards (NDFs) |

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| | <p><u>Asset Precious metals</u></p> <p>After completing this module you will</p> <ul style="list-style-type: none"> • know the most important precious metals for investment purposes • understand the most important factors for determining the price of gold • be able to explain the basic investment opportunities in precious metals to your client • be familiar with direct investment in precious metals, precious metal accounts, ETFs and gold mine shares <p><u>Commodities</u></p> <p>After completing the study of this module</p> <ul style="list-style-type: none"> • you will know the most important raw materials that are suitable for investment purposes. • you will understand the specifics of the commodity market • be familiar with the price determinants of important raw materials • be able to explain to a customer the opportunities and risks of the basic investment opportunities in raw materials • know in particular about the commodity investments in exchange traded funds, exchange traded commodities and stocks of commodity companies <p><u>Real estate</u></p> <p>Upon completion of this module</p> <ul style="list-style-type: none"> • you will understand the significant importance of real estate for the Swiss national economy and the opportunities it offers investors, • you will know about the options and risks that investors face when investing in real estate, • you will be familiar with the possibilities for direct and indirect investments in real estate. |
| Method | Individual study via interactive e-learning module with discoverable content and videos plus final learning control via online test. |
| Learning control | Your online self-control test consists of 15 to 20 multiple choice questions. You will pass the test if you reach at least 70% of the maximum score. |