



SUBSIDIZED SEMINAR– DISTANCE LEARNING TEACHING

# Investment Skills – Preparation for the CFA Institute Investment Foundations Program

**Duration:** 32 hours

**Dates:** 04/12/2021 – 19/02/2022

**Early Bird\*:**

**Participation fee:** €680 + VAT

**HRDA Subsidy:** €544

**Final cost for companies:** €136 + VAT (€129.20)

\*€100 discount if fee is paid by November 24th

To apply please click [here](#)

## PURPOSE OF THE PROGRAM

The investment services sector is rapidly developing in Cyprus and a growing number of professionals are currently employed in this field, including those working in technology development, accounting, administration, and law. However, many of these professionals need further training and deepening of their knowledge and skills regarding the provision of investment services and the protection of the integrity of this sector. The purpose of the proposed seminar is to provide the necessary knowledge and skills that should govern all professionals in the investment industry, including ethics and investment professionalism. The program follows the material of the CFA Institute, a global professional organization that aims to promote ethical standards, education and professional excellence in the global investment industry. In addition, this Program prepares the participants for the professional examination - CFA Institute Investment Foundations™.

## COST OF THE PROGRAM

Participation fee*	HRDA Subsidy (for beneficiaries)	Final Cost	Discount to non-beneficiaries
€ 780 + VAT (19%)	€544	€236 + VAT €148.20	20%

\*Beneficiaries of the subsidy are employees of companies / organizations (grant € 544.00) and unemployed (100% grant) provided that they meet the conditions set by the HRDA.

## LEARNING OUTCOMES

Upon completion of the program, the trainees will acquire significant knowledge related to the provision of investment services, enhancing their existing experience in the field.

Through targeted training, they will be able to develop their professional background, understand regulatory issues governing the investment industry and follow best practices while providing services to their clients.

*Specifically, trainees will be able to:*

- describe the activities in the investment services sector and the trends in the investment industry.
- understand the importance of ethics and legislation in the provision of investment services.
- examine companies at the micro and macro levels by considering factors affecting supply and demand, elasticity of demand, and competition.
- classify accounting information in financial statements and distinguish between the concepts of accounting and economic profit.
- know the basic characteristics of bonds, stocks, and options' markets, as well as the investment risks involved in these markets.
- describe the operation of markets (primary and secondary), stock buying and selling strategies and risk management.
- analyze corporate policies at the microeconomic level.
- perform calculations concerning the time value of money and analyze data related to statistical indicators and investment returns.
- use economic indicators to assess firms' investment risks and returns.
- know the documents that are necessary for investment management, communication with the client, and for the stakeholders of the company.
  - manage and prevent attempts of fraudulent and immoral behaviour against clients (investors).
  - take actions aimed to protecting the investors' interests and to follow best investment practices.
  - participate in the development of investment strategies for clients.

Also, through the content of the program the trainee will be able to diagnose and manage risks and challenges related to ethics and integrity, which directly and to a large extent affect the smooth operation of the investment industry.

University of California, Berkeley. He is currently an Assistant Professor of Finance at Frederick University and serves the department as the Department's Chair and as the coordinator of the Accounting and Finance program. His research focuses in the area of investments using real options and their corporate finance applications such as mergers and acquisitions, firms' dividend policies and optimal capital structure. He has published research in high-ranked peer reviewed academic journals such as the Journal of Banking and Finance, the European Journal of Operational Research and the Journal of Empirical Finance and has international collaborations with researchers from the University of Bologna, University of Oxford and Universitat Autònoma de Barcelona. He worked as a research analyst in a financial consulting firm in Milan Italy where he was involved in a number of firm valuations, the development of optimal fund management portfolios and the development of a real options software. He has successfully managed a number of funded projects from the Cyprus Research Promotion.

## TARGET AUDIENCE

Employees in the financial sector, or to jobs related to the investment sector, including people involved in technology development and investment product support, accounting, administrative duties in investment-related areas and legal advisers to investment companies.

## DATES

Date	Time
04/12/2021	09:00 – 12:15
11/12/2021	09:00 – 12:45
18/12/2021	09:00 – 12:45
08/01/2022	09:00 – 12:45
15/01/2022	09:00 – 12:45
22/01/2022	09:00 – 12:15
29/01/2022	09:00 – 12:45
05/02/2022	09:00 – 12:15
12/02/2022	09:00 – 12:45
19/02/2022	09:00 – 11:00

## INSTRUCTORS



**Constantinos Kourouyiannis** is Executive Director of Easternmed Asset Management Ltd, a leading UCITS Management Company in Cyprus. He is a CFA charterholder with broad experience in portfolio management of collective and individual portfolios of professional and institutional clients. He is the Secretary of the CIFA Asset Management and Distribution Committee and Member of the CFA Research Challenge and University Relations Committee. Throughout his career, Constantinos delivered seminars and provided training to investment professionals in various topics of the European legal framework of investment services and regulated markets (MiFID) and Alternative Investment Funds. While working at the University of Cyprus, he taught Corporate Financial Management, participated in two research programs in the areas of Financial Risk Management and Econometrics and presented his work in reputable international conferences. He holds a BSc in Mathematics and Statistics and a PhD in Economics from the University of Cyprus as well as an MSc in Finance and Economics from the London School of Economics. He is also registered in the CySEC Public Register of Authorized Persons with the Advanced Examination.



**Nicos Koussis** holds a PhD in Finance from the University of Cyprus. He specializes in the area of investments using real options. Dr. Koussis has been a visiting research fellow at the Massachusetts Institute of Technology and a visiting instructor/reader at the