



INTUITION®

# Private Investor

*A course from Intuition*

The COVID-19 crisis saw an extraordinary upsurge in speculative trading activity on the part of private investors. For regulators and providers, this brought into focus the responsibilities owed to such investors, many of whom lacked even basic knowledge of financial markets.

But this trading frenzy stands apart from the wider retail investment market that dwarfs this short term speculative activity.

With this in mind, Intuition is pleased to announce ***Private Investor***, a white-label educational package that tackles the subject of investing from a long term perspective and gives product providers the means to equip clients with a sound foundation in investment principles.



# Investing Basics

## **Reasons to Invest**

- Compound returns
- Inflation
- Asset classes
- Investment options

## **Investment Objectives**

- Short and long term goals
- Time horizon
- Liquidity
- Risk and return
- Risk tolerance
- Risk factors

## **Investor Behaviours**

- 'Rational' investing
- Loss aversion
- Investor bias
- The investor cycle (emotions)

## **Ways to Invest**

- Direct investing
- Portfolio management
- Mutual funds
- Active v Passive
- ESG investing

# Investing in Equities

## **Introducing Equities**

- Definition
- Price return & total return
- Stock Indexes
- Size, sector, maturity

## **Equities and Risk**

- Volatility
- Systematic risk
- Unsystematic risk
- Beta
- Diversification

## **Equities and the Economic Cycle**

- Expansionary phase
- Intermediate phase
- Advanced phase
- Recession

## **Equities Sectors**

- Sector categories
- Cyclical stocks
- Defensive stocks
- Performance and the economic cycle

## **Equity Styles**

- Growth stocks
- Value stocks
- Income stocks
- Thematic investing

## **Equities Analysis**

- Fundamental analysis
- Top-down analysis
- Bottom-up analysis
- Technical analysis

## **Analysis: Key Ratios**

- Earnings per Share
- Price/Earnings Ratio
- P/E interpretation
- P/E limitations
- PEG ratio
- Price/revenue ratio

# Investing in Bonds

## **Bonds Introduction**

- Definition
- Bond Issuers
- Par, coupon & maturity
- Credit ratings
- Credit spread

## **Price & Yield**

- Price components
- Price vs. yield
- Yield calculation

## **Valuation & Risk**

- Supply and Demand
- Credit Quality
- Interest rates
- Time to maturity
- Risk factors



## Multi-Asset Investing

### **Asset Allocation**

- Strategic Asset Allocation
- Portfolio structure
- Portfolio drift
- Tactical asset allocation

### **Asset Diversification**

- Correlation
- Stocks/Bonds correlation
- Types of diversification

### **Multi-asset Portfolios**

- Asset classes
- The 60/40 portfolio
- Alternative assets

## Investing in Funds

### **Investment Funds - Introduction**

- Mutual funds mechanics
- NAV calculation
- Fund factsheets
- Funds - advantages

### **Funds - Performance**

- Unit prices
- Calculating returns
- Judging performance
- Benchmarking

### **Index Funds & ETFs**

- Active management
- Index funds
- Fees
- ETFs

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