CFA Society Singapore

Masterclass: Investing & Trading Strategies using Behavioural Technical Analysis

IBF Programme Code: P220301JWC

REGISTER TODAY !

15, 16, 22 & 23 September 2022

2:00pm to 6:00pm (Daily)

100% ONLINE — Live instructor-led course via Zoom

UP TO 50% - 90%* — IBF- FTS Enhanced Funding Support

*(*Subject to eligibility)*

14 CPD & PL Hours

(Each participant will get an E-Certificate upon completion)

COURSE TRAINER
Ron William, CFTe, NLP

COURSE FEE

CFA Society Singapore member:
S$1,580* (Early bird fee)
S$1,780* (Standard fee)

Non member:
S$1,780* (Early bird fee)
S$1,980* (Standard fee)

*(*Price subject to 7% GST)*

Group discount available. Contact us to find out more!

Early Bird fee valid till
31 August 2022

COURSE OVERVIEW

Gain an edge with a market & mind strategy by learning how to successfully apply behavioural technical analysis. The discipline is building more popularity during the latest VUCA environment and with further advances in behavioural and data science application.

Learn a top-down framework, blended with economic and business cycle analysis. Tactical overlays include trend (momentum), multi-timeframe, pattern recognition and price level identification. All with the ultimate focus of the development of investing-trading strategies and high-probability opportunities.

Technical indicators will also be covered in-depth, grounded in a robust diversified toolkit, based on momentum, volatility and liquidity measures. This includes specific indicators like moving averages, MACD, RSI, Bollinger Bands, Volume, Flow of Funds and many more.

Expect advanced techniques, in terms of evaluation of a range of trading strategies, coupled with performance and risk management. Factor analysis is briefly addressed for a greater understanding of adapting to changing market regimes. A bonus section features an introduction to market timing using DeMark™ indicators, famous for precision signals.

Finally the masterclass ends by putting it all-together, tailoring to each individual delegate need, across the spectrum, including traders, wealth managers, analysts or client advisors. There will be an opportunity to do a global, cross-asset review and test your knowledge as part of the assessment work.

CFA Society Singapore (A member society of CFA Institute)
20 Cecil Street, #08-10, PLUS, Singapore 049705 | Phone : (65) 6323 6215 / 6227 8562
Website : www.cfasocietysingapore.org | email : eventmanagement@cfasocietysingapore.org

WHY TAKE COURSE?

WHO SHOULD ATTEND?

- CIOs
- Portfolio Managers
- Private Bankers, Wealth Managers and Relationship Managers
- Traders & Investors
- Hedge Fund managers
- Client Advisors
- Analysts – Investment Banks/Asset Managers/ Family Offices/ Hedge Funds
- Risk managers
- Cross Asset Professionals (e.g. FX, Fixed Income, Commodities & Equities)

- Gain deeper understanding of Behavioural Technical Analysis, so as to design better investment solutions and help clients make better investing & trading decisions.
- Benefit from latest market timing and risk management strategies.
- Evaluation of global, cross-asset market opportunities.

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COURSE OUTLINE

Evolution of Financial Market Theory
- EMH & Fat-tails
- Crowd psychology & Social mood
- Dow Theory; building blocks of technical analysis
- Gaining an edge with a market & mind approach

Cycles Analysis
- Dewey & The Foundation of the Study of Cycles (FSC)
- Economic & Business cycle
- Seasonality

Top-Down framework
- Trend (momentum), identification & analysis
- Multi-timeframe, strategic, tactical & active
- Pattern recognition, behavioural interpretation & opportunities
- Key price levels, identifying & assessing strength

Indicators Toolbox
- Moving averages, types, periods & trading techniques
- Diversification: Momentum, Volatility & Liquidity
- Momentum, trend-following & exhaustion (e.g. RSI)
- Volatility, mean-reversion & risk (e.g. Bollinger Bands)
- Liquidity, confirmation (e.g. volume, fund flows)

Advanced Techniques
- Trading strategies
- Factor Analysis
- Market Timing using DeMark™ Indicators

Interactive Session
- Putting it all-together
- Global, Cross-Asset review (e.g. FX, Fixed Income, Commodities & Equities)
- Assessment work

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FEATURED TRAINER

Ron is a market strategist, educator/mentor and performance coach; with +20-years of experience, working for leading economic research & institutional firms; producing tactical research and trading strategies. He specializes in global, multi-asset, top-down framework, behavioural technical analysis, driven by cycles and proprietary timing models.

Ron also applies a *market & mind* approach at IntensiChi, using latest techniques in behavioural-risk models. He is a member of two leading neuroscience groups (ANE & NLI), trained by the *International Coaching Federation* (ICF), and teaches a regulatory approved Masterclass in *"Applied Behavioural Science"* with leading investment, private banks and CFA.

Ron's primary work, as part of his current institutional market advisory firm (RWA), acquired global industry recognition, as winner of "Best FX Research" in 2020. His market insights are featured regularly across notable financial media programs and industry publications; notably "Is the big cycle turning?" predicting the 2020 crash and alerting the "Minsky paradigm" of 2020 H2-2022.

Driven by high-integrity education, Ron serves as part of the education committee of the International Federation of Technical Analysts (IFTA); Heads SAMT Geneva Chapter and is an Honorary member of ESTA. He is also a visiting lecturer at leading universities, active guest speaker for the CFA, CAIA & CISI, and senior teacher at colleges offering an accredited diploma in trading and investing.

Professional Qualifications

Grounded with his practical market experience, Ron specialized as a Chartered Financial Technician (CFTe), the gold standard benchmark in Behavioural Finance, Market Timing and Risk Management. Ron also expanded into the field of training and the study of neuroscience as a Master Neuro Linguistic Practitioner (NLP), where he modelled the behavioural attributes of leading traders and investors, with the primary aim of teaching other professionals how to develop their own path of success. Latest work in this field now includes ongoing studies with the International Academy of Neuroscience and Education (ANE).

Training Experience

Ron is an active teacher and mentor – as a leader in his professional work and global educational societies that set the benchmark study of his discipline. In past years, during his work at Bloomberg, Ron trained financial professionals across the world, including tier one banks, funds and brokers. He is also a visiting professor at leading universities, active guest speaker for the CFA & CAIA, and senior teacher at colleges offering accredited diplomas in trading and wealth-management.

IBF-FTS Funding Quantum

This programme is approved for listing on the Financial Training Scheme (FTS) Programme Directory and is eligible for FTS claims subject to all eligibility criteria being met. Please note that in no way does this represent an endorsement of the quality of the training provider and programme. Participants are advised to assess the suitability of the programme and its relevance to participants' business activities or job roles.

This scheme is only eligible for only company-sponsored (Financial Institutions and eligible FinTech Firms) participants who are Singapore Citizens or Singapore Permanent Residents, physically based in Singapore and who have successfully completed the FTS programme.

For IBF recognised courses commencing between 1 July to 31 December 2022, the subsidies will cover up to 50% funding support of direct training cost. However, Singapore Citizens aged 40 years old and above will be eligible for 90% funding support, subject to a cap of S$2,000 per candidate per programme subject to all eligibility criteria being met.

Please refer to www.ibf.org.sg for more information.

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