CFA Society Singapore

EXECUTIVE PROGRAMME

BEHAVIOURAL FINANCE MASTERCLASS

"A Practical Application of Behavioural Finance for your Investing & Trading Strategy"

IBF Programme Code: TGS-2022602555

REGISTER TODAY !

19, 20, 26 & 27 April 2023

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

100% ONLINE — Live instructor-led course via Zoom

UP TO 30% - 70%* — 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 8% GST)*

Early Bird ends 04 April 2023, 5pm.

Group discount available. Contact us to find out more!

COURSE OVERVIEW

Your behavioural DNA is at the heart of investing and trading. Learn why many professionals around the world are now benefiting from greater behavioural self-awareness, while avoiding costly financial mistakes.

This interactive workshop will enable you to **better understand your nature-nurture signature**, in terms of **biological survival programming vs. environmental influences** that **shape your decision-making process**.

A **deep-dive review of the top investor bias** will also be covered, notably emotional (feeling-based) and cognitive (mental pressures). Why they happen and how to monitor them, using practical strategies.

- ☑ **PERFORMANCE ENHANCEMENT**
- ☑ **RISK OPTIMISATION**
- ☑ **SYSTEMATIC PROCESS**

Note: Participants will develop tailored approaches to mitigate the effects of behavioural biases across a variety of challenges, including live trading, investment policy and client engagement.

Performance coaching sessions will also be offered to help achieve personal and professional goals, while also developing resilient strategies; as effective leaders, teams and risk-takers.

CFA Society Singapore (A member society of CFA Institute)
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Interesting to hear non-consensus market views and how to develop scenario planning as a risk management tool.

Hedge Fund Manager

LEARNING OBJECTIVES

- **Improve your bottom-line equity performance**, **apply more diligent risk management, behavioural bias optimisation** and build a systematic trading process.
- Gain deeper understanding of Behavioral Finance and Technical Analysis principles, to **design better investment solutions and help clients make better investing decisions.**
- How Behavioral Finance bias affects HNW clients, including herding, overconfidence and loss aversion. All supported with **practical mitigation and optimisation strategies**.

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)**

Learnt about how to better understand my clients - behavioural patterns, biases and how to better tailor investment solutions.

Relationship Manager

UNIQUENESS OF THIS COURSE

WHY LEARN FROM US?

- Leading expertise, driven by +20 years of industry track and actionable strategies

REFRESHER SESSION

- Refresher session available at discounted rate within 3 years after the course.

COMPLIMENTARY ASK RON ANYTHING SESSION (ARA)

- Participants can attend the ARA session (2 hour complimentary - online session) with Ron to recap on the course
- Q&A session on BF / TA matters
- Consultation on case studies

PERFORMANCE COACHING SESSION

- Participants are entitled to a complimentary 1 hour (online) performance coaching session with Ron William.
- Coaching work focuses on tailored solutions and practical application

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COURSE OUTLINE

Nature or Nurture, are successful traders born, or can they be trained?

- How can you gain an edge with Behavioural Finance strategies?
- Evolution of Financial Market Theory & the VUCA landscape
- Learn about the top attributes of successful traders and develop greater self-awareness
- Survival state reactions: Fixed biology or changeable?
- How does the environmental influence of your life influence perceptions of trading, risk and money?
- Peak performance roadmap to transformation

How Trading Psychology Awareness can Improve your Performance?

- 80/20 rule of strategy and psychology
- The importance of accessing your supercomputer mind
- Trader Personality and Risk Assessment Development
- The power of brain change, neuroplasticity and how we can train our muscle memory

Overcoming Trading Mistakes

- Mistake culture and why rising market volatility will pressure our mindset?
- The power of now. Learn how to fail forward by learning from past mistakes
- Review common mistakes in our Psychology, Strategy & Risk/Money Management
- Behavioural Portfolio Analysis & Scenario Planning

Resilience & Stress Response Management

- Performance Lifestyle Assessment
- Leading Mental Strategies
- The Science of Mindfulness
- Coherence Training, including biofeedback

Gaining an Edge with Market Timing

- Dow Theory; building blocks of technical analysis
- Developing market timing using cycles, for investor and trader horizons
- Top-down process; trends, levels & indicators

Risk Management in Volatile Markets

- Investor due diligence; lessons from the past
- Global Market Outlook; Equities, FX, Commodities and local markets
- Interactive session, with Q&A

FEATURED TRAINER

Ron is a market strategist, educator/mentor and performance coach, with +20-years of experience. Ron blends a market & mind approach at IntensiChi, using latest techniques in Behavioural Modelling & Risk Assessment Optimization, Neuroscience, Mental Strategies, Decision Science and Stress Response Management, including Mindfulness & Coherence Training. He is a member of two leading neuroscience groups (ANE & NLI), the International Coaching Federation (ICF), and teaches a Masterclass in "Applied Behavioural Science" at the CFA Singapore.

Ron's primary focus is with traders, asset managers, client-investor engagement teams and C-suite management across corporates, wealth management and investment banks, helping to achieve personal and professional goals and develop resilient performance strategies in a disruptive VUCA World; as effective leaders, teams and risk-takers.

Ron's current institutional market advisory firm (RWA), acquired global industry recognition with multiple Finalist Awards for "Best Specialist Research/& FX". His market insights are also featured regularly across leading financial media programs (notably "The Minsky moment" paradigm of 2020 H2/2021, "Gold spike risk into 3k" & "Asia's great reversal signal"

Driven by high integrity education, Ron serves on the board of the International Federation of Technical Analysis (IFTA), Heads the Swiss Association of Market Technician(SAMT) Geneva Chapter and consults with multiple education & regulatory groups. He was also invited by the House of Commons, to join an industry guidance team, following the official launch of an All Party Parliamentary Group (APPG), in Digital Currencies.

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 from 1 January 2023, the subsidies will cover up to 30% funding support of direct training cost. However, Singapore Citizens aged 40 years old and above will be eligible for 70% funding support, subject to a cap of S$500 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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