CFA Society Singapore | IBF The Institute of Banking & Finance Singapore

Behavioural Finance Masterclass

Conducted by Ron William, CFTe, NLP

IBF Programme Code: TGS-2022602555
14 CPD & PL Hours

Behavioural Finance Masterclass

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.

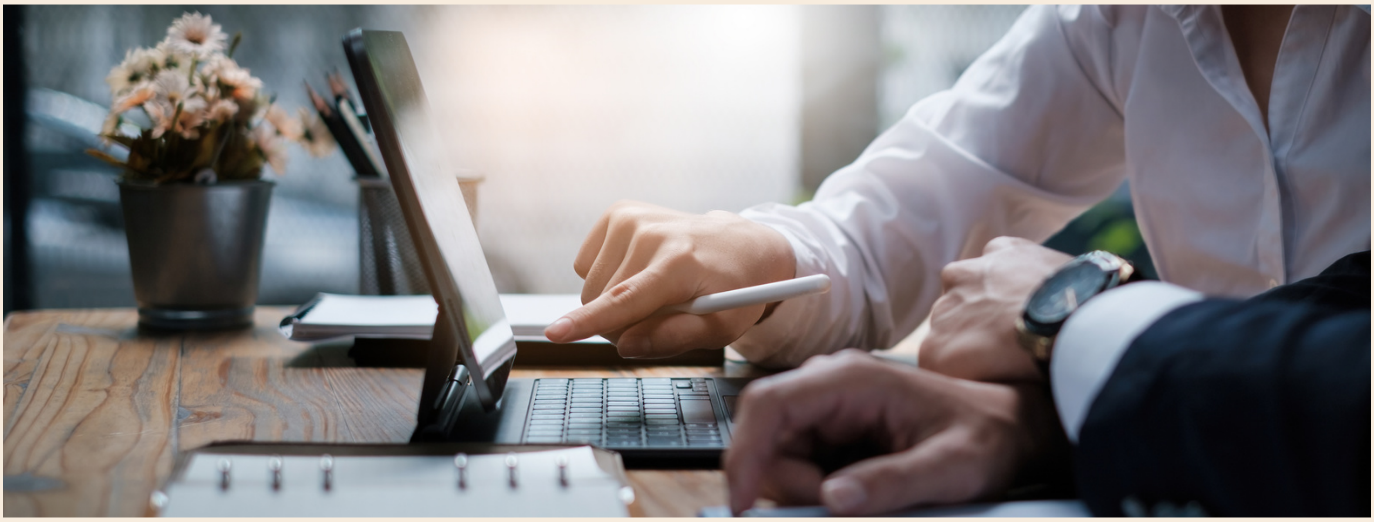
This interactive workshop will enable you to **better understand your nature-nurture signature**, in terms of **biological survival programming vs. environmental influences** that **shape your decision-making process**.

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.

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.

Behavioural Finance Masterclass



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)

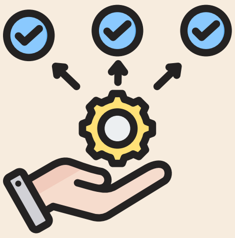
Learning Objectives

- **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 p**ractical mitigation and optimisation strategies.**

Professional Learning Credits

This course is eligible to earn **14 CPD & PL credits**. Each participant will earn a certificate upon completion of the programme.

About the Course



Why learn from us?

Benefit from our leading expertise, driven by +20 years of industry track and actionable strategies

Refresher Session

Refresher sessions are available at a discounted rate within 3 years after the course.

Complimentary Ask Ron Anything Session (ARA)

- A complimentary 2-hour online session with Ron William to recap the course
- Q&A session on BF / TA matters
- Consultation on case studies

Performance Coaching Session

- A complimentary 1-hour online performance coaching session with Ron William
- Coaching work focuses on tailored solutions and practical application

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 Pyschology 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

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

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

Course Fees

**Fees are not inclusive of GST unless stated otherwise*

Course Fee	
CFA Society Singapore Member	**$1,780**
Non-Member	**$1,980**

Eligibility Criteria for IBF-FTS

Eligible Participants

Applicants must be a Singaporean or a Singapore PR (Permanent Resident), physically based in Singapore. This scheme is available for company-sponsored individuals who successfully complete the training programme with at least 75% of class attended.

NOTE: CFA Society Singapore is currently operating this programme on a nett fee model. Participants will pay the unsubsidised portion of the course fees including GST.

Funding Quantum

This programme has been accredited under the IBF Standards, and is eligible for funding under the IBF Financial Training Scheme (IBF-FTS), subject to all eligibility criteria being met.

IBF-FTS provides 30% funding for direct training costs, subject to a cap of S$500 per candidate per programme, for all Singaporeans and Singapore PRs who are physically based in Singapore. Singapore Citizens aged 40 years old and above will be eligible for 50% co-funding of direct training costs.

For more information on funding, IBF Certification and Continuing Professional Development (CPD) requirements, please visit www.ibf.org.sg.

CFA Society Singapore

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