

# Fundamentals of Investment

**Purpose:** This course introduces learners to the basics of investment, investment markets, strategies and products and provides a basis for them to evaluate investment options on behalf of investors.

## **Course content:**

- The basics of investment
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- » The mathematics of investment
- » An overview of shares and the stock market
- » Prospectuses and Investment Statements
- » Derivatives and securities
- » Fixed interest investments
- » Property investments
- » Managed investments
- » Advice process and client needs analysis

## **Learning outcomes:**

On successful completion of this course, learners will be able to:

- » conduct basic investment calculations
- » determine a client's risk profile and explain the concept of risk and return
- » assess, measure and analyse financial risk
- » conduct a client needs analysis
- » assess and analyse investment portfolios and investment trends and performance
- » develop appropriate solutions to meet the client's needs
- » develop an investment plan or portfolio with fully substantiated recommendations
- » implement, monitor and review a client's portfolio and make necessary recommendations
- » provide advice in derivatives and securities
- » explain the features and benefits of the various investment products

## **Delivery methods:**

This course is designed to be delivered through a combination of individual study and in a classroom/workshop format led by an experienced facilitator. This course is also available and fully supported through the Adviserlink distance learning programme.

This course is approved by the New Zealand Qualifications Authority under the provisions of the Education Act 1989, and Adviserlink Learning Ltd is accredited to teach it.

## Assessment:

### Assessment for Classroom option:

Assessment	% of Overall Assessment
Pre-course assignment – readings and short answer questions	10%
Post-course assignment – case study: Investment Plan	40%
2-hour closed book examination	50%

### Assessment for Distance learning option:

Assessment	% of Overall Assessment
Assignment 1 – short answer and scenario based questions	5%
Assignment 2 – short answer and scenario based questions	5%
Assignment 3 – case study: Investment Plan	40%
2-hour closed book examination	50%

### Pre requisite/s:

Open entry

### Dates of course/s:

Registrations for distance learners are accepted at any time throughout the year. Please refer to the course calendar on our website [www.adviserlink.co.nz](http://www.adviserlink.co.nz) for the date/s and location of our classroom options.

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