



## 投資管理專家證書課程

### **Professional Certificate in Investment Specialist (PCIS)**

#### **Most Frequently Asked Questions for the PCIM Program**

##### **Completion Time**

There are no specified time requirements. Once admitted to a program each student may work at his/her own pace with the guidance of an adjunct Program Supervisor and the guidance and counsel of the designated service provider's (FE Centre's) administration, as and when required.

##### **Communications:**

Students generally communicate with faculty and the designated service provider's administration by email, telephone, fax, and letter.

##### **Academic Examinations and Assessments:**

There are no timed written examinations to be taken at the end of, or during, our non-resident degree programs. Since each program is tailor-made to meet the needs of each applicant, and because we are dealing with mature adults who are accomplished people, this form of assessment is inappropriate. We therefore utilize continuous assessment and other similar forms of evaluation.

##### **Transcripts and Grades:**

Each successful student receives a transcript which details: the work and activities assigned advance credit standing and the new work and program undertaken with Formula. Since each student comes to our program with a personal and unique prior experience, which results in an individualized program, it is inappropriate to grade one student against another and to award honor or grade average points.

##### **Training Materials**

All study materials will be provided by the designated service provider.

## **Medium of Study**

English or Chinese

## **Tuition Fees**

The total tuition fees of this Certificate course are **HK\$28,000**. A maximum exemption of one module may be granted to student on a case by case basis. Members of the following may be entitled to the one module exemption:

Students who have obtained exemptions of one module will be entitled to pay only the remaining proportion of the total fee.

## **Certificate in Investment Management**

### **PCIS 501 International Investment (國際投資學)**

1. Foreign Exchange
2. Foreign Exchange Parity Relations
3. Foreign Exchange Determination and Forecasting
4. International Asset Pricing
5. Equity: Markets and Instruments
6. Equity: Concepts and Techniques
7. Global Bond Investing
8. Alternative Investments
9. The Case for International Diversification
10. Derivatives
11. Currency Risk Management
12. Global Performance Evaluation
13. Structuring the Global Investment Process

### **PCIM 502 Investment Analysis and Portfolio Management (投資分析與組合管理)**

1. The Investment Background
2. Developments in Investment Theory
3. Valuation Principles and Practices
4. Analysis and management of Bonds
5. Analysis of Common Stocks
6. Derivative Security Analysis
7. Investment Companies and Evaluating Portfolio Performance

### **PCIS 503 The Psychology of Investing (投資心理學)**

1. Psychology and Finance
2. Overconfidence
3. Fear of Regret and Seeking Pride

4. Considering the Past
5. Mental Accounting
6. Forming Portfolios
7. Representativeness and Familiarity
8. Investor Socialization and Mania
9. Self-Control and Decision Making

**PCIS 504 Fundamental of Financial Management (財務管理分析)**

1. Assessing The Financial Health of the Firm
2. Planning Future Financial Performance
3. Financing Operations
4. Evaluating Investment Opportunities