

Banking & Finance: Foreign exchange, Precious metals, Commodities, Real estate

Training program SAM

Title / Topic	Foreign exchange, Precious metals, Commodities, Real estate
Target audience	Asset managers
Learning content	<p>In addition to the traditional investments - i.e. in particular investments in interest rate instruments and equity investments - there are a number of other asset classes which complement the investment universe and are of great significance to the customer for reasons of diversification.</p> <p>These include a variety of different investment categories, e.g. precious metals, commodities, and real estate. Furthermore, foreign exchange markets and foreign exchange transactions are also discussed in this context.</p>
Learning location / Testing location	Fintelligence Online Lernplattform: https://fintelligence.fintelligence-net.com/
Learning time	<ol style="list-style-type: none">1. Foreign exchange market (50 min)2. Foreign exchange transactions (50 min)3. Precious metals (50 min)4. Commodities (50 min)5. Real estate (40 min)6. Learning control (70 min)
Period	2 months
Learning goals	<p><u>Foreign exchange market</u></p> <p>When you have completed this module, you will</p> <ul style="list-style-type: none">• know the most important foreign exchange markets and their participants• know about currency quotations and cross rates• understand the basic exchange rate systems• know the most important international currencies and the importance of convertibility of currencies as well as capital movements restrictions <p><u>Foreign exchange transactions</u></p>

After completing this module, you will

- be able to explain the terms spot exchange transactions, forward exchange transactions and swap exchange transactions to a client
- know how to calculate forward exchange rates and the swap exchange rates
- know about the basic foreign exchange options
- be familiar with non-deliverable forwards (NDFs)

Asset Precious metals

After completing this module you will

- know the most important precious metals for investment purposes
- understand the most important factors for determining the price of gold
- be able to explain the basic investment opportunities in precious metals to your client
- be familiar with direct investment in precious metals, precious metal accounts, ETFs and gold mine shares

Commodities

After completing the study of this module

- you will know the most important raw materials that are suitable for investment purposes.
- you will understand the specifics of the commodity market
- be familiar with the price determinants of important raw materials
- be able to explain to a customer the opportunities and risks of the basic investment opportunities in raw materials
- know in particular about the commodity investments in exchange traded funds, exchange traded commodities and stocks of commodity companies

Real estate

Upon completion of this module

- you will understand the significant importance of real estate for the Swiss national economy and the opportunities it offers investors,
- you will know about the options and risks that investors face when

	<p>investing in real estate,</p> <ul style="list-style-type: none"> • you will be familiar with the possibilities for direct and indirect investments in real estate.
Method	Self-study via interactive e-learning module with discoverable content and videos plus final learning control via online test.
Learning control	Your online self-control test consists of 15 to 20 multiple choice questions. You will pass the test if you reach at least 70% of the maximum score.