



# Managing Stocks & Equity Markets

**Duration:** 5 Days

**Language:** en

**Course Code:** PF1-116

## Objective

Upon completion of this course, participants will be able to:

- Understand the wider stocks and equity market and how it could benefit your company.
- Use trading, exchanges and dark pools to improve company performance.
  - Evaluate risks and create contingency plans.
- Recover from financial loss and reinvest sensibly.
  - Understand methods of raising capital.
- Evaluate the use of dividends and derivatives.
  - Calculate various stock valuation models.
- Construct an equity index that's relevant to your company's development.
- Enable beneficial financial reports and diversify your stocks and equity portfolio.
  - Accurately predict theoretical future stock prices based on markets.

## Audience

This course is designed for anyone in the financial industry interested in growing their business or creating a more solid financial basis by investing in stocks. It would be most beneficial for:

- Investors

- Financial Advisors
- Chief Financial Officers
- Business Owners
  - Accountants
- Private Traders
- Treasurers

## Training Methodology

This course uses various adult learning methods to aid full understanding and comprehension. Participants will view videos and interactive presentations to understand the benefits of stock investment and view some of the main problems based on common mistakes. They will then enjoy group activities to learn and begin utilising key tools and technologies to predict future market changes and understand where a sensible investment could be made. Group discussions will help answer any remaining questions and encourage participants to begin their investment journey. They will also be presented with recommendations for the best tracking and monitoring tools to maintain their positive investment trends and review risk areas to limit financial losses.

## Summary

Stocks and equity markets play an important role in the wider market-based economy. They allow companies to invest in and develop their financial standing, research other company metrics to change their operations, and investigate and recover from financial downturns.

While stocks can be a positive way to improve your market standing, with the ability to increase capital, provide investment options, and improve liquidity issues, companies shy away from stocks and equity just because they don't fully understand the implications and benefits.

Gaining more information on stocks and equity markets can improve business operations, help you understand indices and derivatives, and give you greater insight into the mechanics of stock trading, which can improve your financial statements.

Investing in stocks can vastly improve your business's performance and profits and help you reinvest to aim for continuous improvement.

# Course Content & Outline

## Section 1: Stock & Equity Market Basics

- Different market types.
- Choosing primary or secondary markets
  - Capital gains structures.
  - Equity structures and share types.
- Private sector vs. public sector investments.
  - Exploring your industry.
- Exchanging level 1 and 2 positions.
- Liquidity metrics and short selling.
- Repossession and sector differentiation.

## Section 2: Creating Accurate Financial Statements

- Developing accurate balance sheets.
- Funding applications and methods.
- Income and cash flow statements.
- EBITDA, net income, and revenues.
  - Enterprise and investment value.

## Section 3: Metrics, Reporting & Predictions

- Understanding financial ratios.
  - Relative value analysis.
- Fiscal periods, data, and calendarisation.
- Forecasting and estimation based on accurate data.
  - Finding reliable data sources.
  - Stock ratings and amendments.

## Section 4: Corporate Actions & Equity Models

- Stock splits and spin-offs.
- Mergers and acquisitions issues (M&A).
- The public offers process and rights issues.
  - Earning announcements and buy-backs.
  - Learning about dividends.
- The Capital Asset Pricing Model (CAMP).
  - Beta and Alpha Equity Models.

- The Gordon Growth Model.
- Peer and valuation reporting.

### **Section 5: Indices, Portfolios & Funding Measures**

- Index fundamentals within Modern Portfolio Theory.
  - Open and closed-ended funding options.
  - Data correlation and diversification.
    - Passive and active funding.
  - Price and capitalisation indices.

### **Section 6: Learning About Equity Derivatives**

- The basics of equity derivatives.
- Future fair value and cost-carrying objects.
  - The Black Scholes pricing framework.
    - Implied volatility and surfacing.
- Structured products and exotic derivatives.

### **Section 7: Trading Stocks - Your Next Steps**

- Tracking the financial market.
- Accepting and following reliable advice.
  - The macroeconomic picture.
  - Risk management and mitigation.
- Market entry points and understanding your chances.
- The fees and commissions that come with live broker accounting.

## **Certificate Description**

Upon successful completion of this training course, delegates will be awarded a Holistique Training Certificate of Completion. For those who attend and complete the online training course, a Holistique Training e-Certificate will be provided.

Holistique Training Certificates are accredited by the British Assessment Council (BAC) and The CPD Certification Service (CPD), and are certified under ISO 9001, ISO 21001, and ISO 29993 standards.

CPD credits for this course are granted by our Certificates and will be reflected on the Holistique Training Certificate of Completion. In accordance with the standards of The CPD Certification Service, one CPD credit is awarded per hour of course attendance. A maximum of 50 CPD credits can be claimed for any single course we currently offer.

## Categories

Finance, Accounting & Budgeting, Management & Leadership, Retail and Trade

## Tags

Trading, Stock, equity, market

## Related Articles



### **Stock Investing: Risks, Rewards & Its Importance In The Presence Of Cryptocurrencies**

Explore the risks and rewards of stock investing and discover how to evaluate risk-return ratios. Learn about different types of stock investments and their implications. Understand .the evolving landscape of cryptocurrencies and its impact on stock investing

## YouTube Video

<https://www.youtube.com/embed/IHeFEu9i0yM?si=uqgkwVphfuBrIkyO>