

▶ **CISI - International Investment Management Paper**

The International Certificate in Investment Management (ICertIM) is targeted at professionals engaged in managing investments. It has been designed to provide a test of competence for individuals engaged in private client asset management (discretionary portfolio management) and fund management.

The full ICertIM consists of two separate Papers. The Regulatory Paper appropriate to the local environment (i.e. the UAE Financial Rules & Regulations Paper or the DIFC Rules & Regulations Paper) and the International Investment Management Paper.

The International Investment Management Paper provides a firm grasp of the different asset classes and financial markets as well as the underpinning disciplines of economics, financial mathematics and accounting. The Paper also provides coverage of the main tools of investment management: investment analysis, portfolio management and performance measurement, helping candidates prepare for the industry issues they are likely to encounter.

Course Highlights

Exam Structure

Two hour exam with 100 multiple choice questions.
Pass mark - 70%.

CISI Fee's

Exam & Workbook - 175 GBP (payable directly to the SCA or the CISI)

SCA regulated staff should order their work book and reserve their exam date by submitting the [SCA Examination Entry Form](#) to SCA.

▶ **Who should attend?**

The ICertIM is designed for professionals working in Managing Investments; Advising on Investments; and Discretionary Portfolio Management. However its wide ranging syllabus also offers an excellent guide to investment management in general and can be used as a knowledge building introduction for those needing to better understand

investment issues.

Order your workbook & reserve your exam date

To gain maximum value from the training course, it is strongly advised that attendees read the workbook prior to attending the course.

To order your workbook and reserve your exam date you need to register with the CISI. This can be done through their [booking portal](#).

▀ Syllabus

Element 1 - Economics

- 1.1 Microeconomic Theory
- 1.2 Macroeconomic Analysis

Element 2 - Financial Mathematics and Statistics

- 2.1 Statistics
- 2.2 Financial Mathematics

Element 3 - Industry Regulation

- 3.1 Corporate Governance
- 3.2 Overseas Regulators

Element 4 - Asset Classes

- 4.1 Equities
- 4.2 Fixed Interest
- 4.3 Cash and Money Market Instruments
- 4.4 Derivatives
- 4.5 Property
- 4.6 Alternative Investments

Element 5 - Financial Markets

- 5.1 Exchanges
- 5.2 Dealing and Settlement
- 5.3 International Markets
- 5.4 Foreign Exchange

Element 6 - Accounting

- 6.1 Basic Principles
- 6.2 Balance Sheet
- 6.3 Income Statement
- 6.4 Cash Flow Statement

6.5 Consolidated Company Report and Accounts

Element 7 - Investment Analysis

7.1 Fundamental and Technical Analysis

7.2 Yields and Ratios

7.3 Valuation

Element 8 - Taxation

8.1 Business Tax

8.2 Personal Tax

8.3 Overseas Taxation

Element 9 - Portfolio Management

9.1 Risk and Return

9.2 The Role of The Portfolio Manager

9.3 Fund Characteristics

Element 10 - Performance Measurement

10.1 Performance Benchmarks

10.2 Performance Attribution

10.3 Performance Measures

- Taught by a leading CISI trainer with a combination of practitioner and training experience
- Limited class sizes, to ensure interactive teaching environment

► **Delivery Methods [available methods depend on the course]**



Bring In-House

If you have a number of people who require the training, you might find it more economical to have the training at your offices. Our trainers are armed with all the equipment and materials necessary. All you need to do is supply the room, and after the course, we'll send your certificates of attendance in the post.

In addition in-house courses can be tailored to meet the precise needs of your business. This could mean tailoring a course for a business unit; combining elements of different courses to match your exact specification; or producing a course from scratch.

Enquiries

Please complete [the following form](#) and we'll get in touch to discuss your requirements in detail.

Off-site Training

Our training facilities can also be used for company 'off-site training'. So if you want to have an 'in-house style' training session away from your own offices, or you simply don't have the facilities, then you can use ours.

Enquiries

Please complete [the following form](#) and we'll get in touch to discuss your requirements in detail.

▸ Trainers

Martin Mitchell

Martin has trained CISI qualifications for almost 20 years, and is one of the world's most experienced CISI trainers. He is expert at keeping his audience motivated and focused on the task, leading to exceptional success rates. Martin has run numerous courses in the UAE – he regularly tutors candidates for the International Investment Award, the DIFC Rules and Regulations examination, and other CISI qualifications including the Certificates in Investment Management, Securities and Derivatives.

Martin is a fellow of the Chartered Institute for Securities & Investment (CISI) and a qualified accountant with the Institute of Chartered Accountants of England and Wales (ICAEW). Martin qualified as an accountant with a forerunner of the global accountancy firm Ernst and Young in London, where he was involved in auditing financial institutions

that subsequently became parts of HSBC, UBS and Citigroup. After qualifying, Martin started training others, initially training aspiring accountants and then moving into training in the City of London. It was during this period that Martin first started training towards the Chartered Institute for Securities & Investment examinations, introducing innovative training techniques and materials.

Martin rose to become Managing Director of a substantial City of London training entity, with a full-time faculty of 15. During his tenure, Martin also began training internationally – particularly in the Middle East and Asia.

During the internet boom, Martin became heavily involved in e-learning and developed a 'blended' learning course for the CISI's Certificate in Securities whilst working as Global Head of Content at venture capital funded firm Wide Learning.

Martin then spent two years at the Chartered Institute for Securities & Investment where he was an Associate Director and ran the publications division, the business development team and numerous train-the-trainer courses. Martin continues to be very active at the CISI, he is senior editor for a number of the CISI's official workbooks, runs train-the-trainer courses to assist in the CISI's accreditation process for training organisations, and sits on the CISI's Examination Board.
