

Target group, previous knowledge

- Our Know the FUNDamentals Basic (KtF Basic) is particularly suitable for newcomers and career changers in the world of collective investment schemes.
- Participants have some experience in the world of finance, but little experience in collective investment schemes.
- Know the FUNDamentals Basic offers participants the opportunity to build up their knowledge of collective investment schemes quickly and in a targeted manner.

Course description

- Compact course, 1.5 days, including short test
- Introduction to the world of collective investment schemes
- Current developments in the market environment and development of product knowledge in Switzerland
- Standardised terminology for a professional exchange between participants
- All important terms and classifications in connection with funds
- Very practical with the use of fact sheets and fund regulations
- Active exchange between lecturers and participants
- Min. number of participants required: 12

Table of contents

- Current economic and stock market environment
- Market and products: fundamentals of the fund business / fund market CH; characteristics /
- how funds work / use and benefits, range of funds / classification
- Legal basics
- Fund pricing

Teaching and learning format

- Preparation: reading, asking questions, preparing, individual to individual learning modules.
- Listening: presentations (experts), exchange, translating content into own language.
- Individual as well as group work and presentations, Q&A
- Processing: reading, asking questions and deepening

Prices

Course KtF Basic	CHF 1'400, plus VAT
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Test KtF Basic:	CHF 200, plus VAT
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