



## **Global Financial Markets Institute, Inc. Course List**

GFMI customizes each and every program delivered to our clients. This list will provide you with an insight as to the breadth of topics at hand. Our consultative process will pinpoint your exact educational needs, manner of delivery, and proprietary exercises—thus resulting in a custom fit versus a generic program.

### **Alternative Investments**

- Hedge Funds (see Hedge Funds)
- Private Equity
- Emerging Markets
- Commodities (see Commodities)

### **Asset and Liability Management**

- Asset/Liability Management in Banks
- Asset/Liability Management in the Insurance Industry
- Capital Management
- Credit Risk Management
- Interest Rate Risk Management
- Introduction to Asset/Liability Models
- Investment/Asset Management
- Liquidity Risk Management
- Risk Based Capital

### **Capital Markets**

- Introduction to Capital/Financial Markets
- Introduction to Equity Markets
- Introduction to Fixed Income Markets
- Introduction to Foreign Exchange
- Introduction to Hedge Funds
- Introduction to Mutual Funds
- Introduction to Securitization
- Introduction to the Commodities Markets
- Introduction to the Securities Industry
- Introduction to the Wealth Management Industry

### **Certification Programs**

- ACI Dealing Certificate and ACI Diploma
- Chartered Financial Analyst; Levels I, II and III
- FRM/GARP
- PRM/PRMIA

### **Commodities**

- Introduction to the Commodities Markets
- Commodity Derivatives
- Commodity Markets Overview
- Crude Oil and Petroleum Products
- Emissions Markets
- Natural Gas Markets
- Precious and Industrial Metals
- US Power Markets

### **Corporate Finance**

- Corporate Finance Applications
- Corporate Valuation Methods
- Structuring the Deal

### **Credit and Credit Analysis**

- Corporate Credit Rating Analysis
- Credit Derivatives
- Credit Modeling
- Credit Portfolio Risk Management
- Credit Risk in Financial Institutions
- Credit Structured Products
- Detecting Early Warning Signs
- Essentials of Bank Analysis
- Introduction to Credit Risk
- Project Finance

### **Credit Derivatives**

- Collateralized Debt Obligations
- Counterparty Credit Risk
- Credit Default Swaps
- Credit Linked Notes
- Credit Modeling: Portfolio Credit and Risk
- Credit Modeling: Single Name
- Investment and Trading Strategies
- Pricing, Trading and Modeling Structured Credit
- Synthetic Collateralized Debt Obligations
- Total Return Swaps

### **Derivatives**

- Introduction to Derivatives
- Commodity Derivatives
- Credit Derivatives
- Equity Derivatives
- Fixed Income Derivatives
- Foreign Exchange Derivatives
- Lifecycle of a Derivatives (and/or OTC) Trade
- Using Derivatives for Risk Management



### **Derivatives (cont'd)**

- Futures and Forwards
  - Introduction to Futures and Forwards
  - Intermediate Fixed Income Futures
  - Intermediate Equity Futures
- Swaps
  - Interest Rate Swaps
  - Credit Default Swaps
  - Other Types of Swaps
- Options
  - Introduction to Options
  - Intermediate Fixed Income Options
  - Intermediate Equity Options
  - Intermediate Currency Options
  - Exotic Options

### **Economics**

- Introduction to International Economics
- Introduction to Macroeconomics
- Introduction to the Federal Reserve
- Economic Issues for Equity Investors
- Economic Issues for Fixed Income Investors
- Economic Issues in Industry Analysis
- Economics in Emerging Markets
- Economic Issues in Foreign Exchange Markets
- Economic Statistics in the Financial Markets
- Global Economics for Global Investors

### **Equities**

- Introduction to Equity Markets
- Advanced Issues in Equity Valuation
- Advanced Issues in Valuation Modeling
- Equity Derivatives
- Equity Portfolio Management
- Equity Valuation – DCF vs. Ratio Analysis
- Financial Modeling for Equity Investors
- Industry Forecasting – When Trends Hit Reality

### **Financial Statement Analysis and Accounting**

- Introduction to Financial Accounting
- Introduction to FSA – Profits, Assets, and Cash Flow
- Finance for the Non Financial Manager
- Financial Transaction Impact on Debt Ratings & Credit Strength
- FSA for Fixed Income Investors (predicting cash flow)
- Ratio Analysis for Equity Investors and Financial Managers
- Ratio Analysis for FI Investors and Financial Managers
- Advanced Issues in Financial Statement Analysis – Reading Between the Management Lines
- Accounting for Lenders
- Using Financial Statements to Uncover Sales and Transaction Opportunities
- Financial Forecasting Using Financial Statements
- Project Analysis and Capital Budgeting

### **Fixed Income**

- Introduction to Fixed Income
- Introduction to Money Markets
- Asset Backed Securities
- Bond Math
- Convertibles
- Fixed Income Derivatives
- Fixed Income Portfolio Management
- High Yield
- Interest Rate Risk Measurement
- Lifecycle of a Fixed Income Trade
- Mortgage Backed Securities
- Option Adjusted Spreads
- Repurchase Agreements
- Structured Securities
- Warrants
- Yield Curve Analysis



### **Foreign Exchange**

- Introduction to Foreign Exchange
- ACI Dealing Certificate
- ACI Diploma
- Currency Futures
- Currency Option Trading Computer Simulations
- Currency Option Trading Strategies
- Currency Options
- Currency Risk Management
- Currency-Linked Notes
- Economics of Foreign Exchange
- Emerging Market Foreign Exchange
- Exotic Options
- Foreign Exchange Derivatives
- Foreign Exchange Operations
- Foreign Exchange Swaps
- Forward Foreign Exchange
- Spot Foreign Exchange
- Spot Trading Computer Simulations
- Technical Analysis

### **Mutual Funds and Hedge Funds**

- Introduction to Mutual Funds
- Hedge Fund Investment Strategies
- Hedge Fund Operations
- IT Innovations and STP
- Mutual Fund Operations
- Organization and Operations
- Regulations

### **Operations**

- Corporate Actions
- Custodian Banking
- Global Custody
- Global Securities Processing
- Intensive US Brokerage Operations
- Inter-Dealer Broker
- Lifecycle of a Listed Derivative
- Lifecycle of a Trade
- Lifecycle of an FX Trade
- Lifecycle of an OTC Derivative
- Masters Class in Operations
- Mutual Fund Operations
- Risks and Fails Management
- Trust Operations

### **Quantitative Methods**

- Introduction to Financial Modeling
- Advanced Issues in Valuation Modeling
- Monte Carlo Simulation
- Quantitative Analysis for Derivatives
- Quantitative Analysis for Equity Investors
- Quantitative Analysis for Fixed Income Investors
- Quantitative Analysis for Portfolio Managers
- Statistical Analysis
- Statistical Sampling and Reporting

### **Portfolio Management**

- Introduction to Portfolio Management
- Active Management vs. Passive Strategies
- Alternative Investment Portfolio Management
- Asset Allocation
- Derivatives and Their Applications in Portfolio Management
- Economics and Portfolio Management Decisions
- Equity Portfolio Management
- Evaluating Portfolio Performance
- Fixed Income Portfolio Management
- Fixed Income Portfolio Management Computer Simulation
- Risk Management in Portfolio Management

### **Regulatory**

- Anti-Money Laundering
- Basel II Implementation for Credit Risk
- Basel II Implementation for Market Risk
- Basel II Implementation for Operational Risk
- Customer Protection in the U.S.
- Rules 15c3-3 and 15c3-1
- Stock Brokerage Accounting



### **Risk Management**

- Asset and Liability Management
- Credit Risk Management
- Credit Risk Modeling
- Introduction to Value at Risk Models
- Liquidity Risk Management
- Market Risk Management
- Operational Risk Management
- Risk Based Supervision of Financial Institutions

### **Securities Lending/Repurchase Agreements**

- Introduction to Repos
- Introduction to Securities Lending
- Advanced Securities Lending

### **Securitization**

- Intro - Securitization/Asset Backed Securities
- Intro - Residential Mortgage Backed Securities
- Intro - Commercial Mortgage Backed Securities
- Intro - Collateralized Debt Obligations
- Intro - Synthetic Collateralized Debt Obligations
- Risk Management in Securitization
- Structured Notes
- Valuation of Asset Backed Securities
- Valuation of Mortgage Backed Securities

### **Structured Assets**

- Introduction to Synthetic and Structured Assets
- Commodity-Linked Notes
- Convertible Bonds and Equity Hybrids
- Credit-Linked Notes
- Currency-Linked Notes
- Equity-Linked Notes
- Interest Rate-Linked Notes
- Pricing, Trading and Modeling Structured Credit

### **Technical Analysis**

- Introduction to Technical Analysis
- Advanced Technical Analysis
- Candlesticks

### **Wealth Management**

- Introduction to Wealth Management
- Asset Management for Individual Investors
- Estate Planning Fundamentals for Wealth Advisors
- Investment Selection for Wealth Advisors
- Tax Issues for Wealth Advisors