

e-learning and reference solutions for the global finance professional

# Equity Markets

The single-best resource for understanding and participating in Global Equity Markets

**After completing this course you will be able to:**

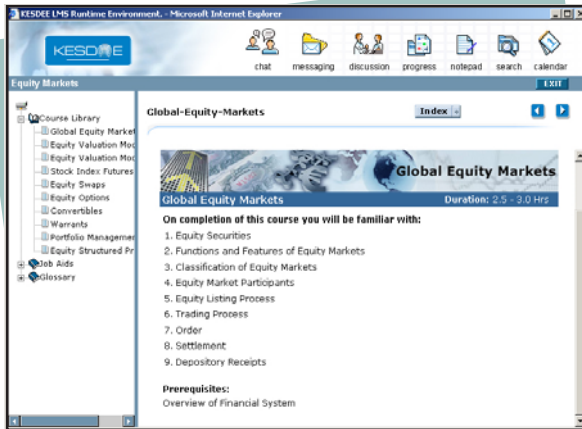
- Understand the dynamics of global equity markets
- Apply various models to value equity
- Use equity derivatives for hedging as well as trading purposes
- Enhance returns and measure performance using portfolio management techniques
- Design and structure equity-structured products



# EQUITY MARKETS

## Overview

This solution deals with equity valuation, global equity markets and equity derivatives of every kind (Stock Index Futures, Equity Options, Equity Structured Products, Principal-protected equity-Indexed Products, Warrants and Convertibles). Practical examples and applications are illustrated from financing, investing, emerging and position-taking activities. The Job Aids include several calculators and simulations.



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### **Course Level & Number of Courses**

Intermediate Level

Library of 10 Courses

### **Instructional Method**

Dynamic, Interactive e-learning

### **Recommended Background**

Familiarity with basic financial concepts

### **The themes of this product are:**

- Structure of equity markets and how they function
- Practical demonstration of established equity valuation models
- Key features of equity derivatives including examples and calculations
- Application of portfolio management techniques in equity portfolios
- Design and structuring of equity structured instruments

**For more information, please visit:**

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# EQUITY MARKETS

## Library of 10 Courses

**Time taken to complete each Course: Two - Three hours**

### **1. Global Equity Markets**

- Functions and features of equity markets
- Equity market participants
- Trading and settlement procedures
- Order types
- Market for depositary receipts

### **2. Equity Valuation Models- I**

- Dividend Discount Model (DDM)
- Single Period Valuation
- Multiple Period Valuation
- Ratio Approach to Equity Valuation

### **3. Equity Valuation Models- II**

- Capital Asset Pricing Model (CAPM) and its Assumptions
- Capital Market Line (CML)
- Security Market Line (SML)
- Arbitrage Pricing Theory (APT) and its Assumptions

# EQUITY MARKETS

## Library of 10 Courses

### 4. Stock Index Futures

- Stock Index Futures and its Uses
- Types of Stock Index Futures
- Stock Index Futures Prices
- Cost of Carry Model
- Fair Value for Stock Index Futures
- Index Arbitrage
- Cash-and-Carry Trade and its Types
- Hedging with Stock Index Futures

### 5. Equity Swaps

- Mechanics of equity swaps and cash flows involved
- Single Currency Equity Swaps
- Cross-Currency Equity Swaps

### 6. Equity Options

- Basics of equity options
- Famous options strategies
- Options pricing using Black-Scholes model

### 7. Convertibles

- Fundamentals of Convertible Bond
- Characteristics of Convertible Bond
- Valuation of Convertible Bond
- Terminologies used in Convertible Bond

### 8. Warrants

- Warrants
- Types of Warrants
- Advantages and Disadvantages of Warrants
- Warrant Pricing Model (Theoretical Value)
- Warrant Pricing Model (Market Value)

# EQUITY MARKETS

## Library of 10 Courses

### 9. Portfolio Management

- Investment objectives and scenarios
- Risk/return profiles
- Efficient Frontier
- Portfolio optimization techniques
- Measuring and evaluating portfolio performance

### 10. Equity Structured Products

- Concept of Structured Products
- Equity-linked Notes
- Structure
- Trading Characteristics

### JOB AIDS

- Measurement Tools
- Disclosures

### Calculators in Equity Markets

1. Equity Valuation – Dividend Discount Models
2. Equity Valuation - Ratio Approach
3. Capital Asset Pricing Model
4. Stock Index Futures – Fair Value
5. Equity Swaps
6. Black-Scholes Option Pricing Model
7. Black-Scholes-Merton Option Pricing Model
8. Option Strategies
9. Treynor's Measure
10. Jensen's Measure
11. Sharpe's Measure
12. Warrants Calculator
13. Convertible Bonds Calculator

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<b>PO Box 910207, San Diego, CA 92191, U.S.A</b>	
 +1-858-755-8527	 +1-858-755-6973, +1-858-756-8587
 information@kesdee.com, information@gfft.com	 www.kesdee.com, www.gfft.com