

Financial Services eLearning

Knowledge By Design



Financial Markets Courses

Also Available on iPad/Android Tablet Devices

Introduction to Financial Markets

- Financial Markets - An Introduction
- Money Markets - An Introduction
- Foreign Exchange (FX) Market - An Introduction
- Bond Markets - An Introduction
- Bond Markets - Issuing & Trading
- Equity Markets - An Introduction
- Equity Markets - Issuing

Business of Banking

- Banking - Primer
- Business of Investment Banking
- Business of Consumer (Retail) Banking

Insurance

- Business of Insurance

Understanding the Corporate Banking Business

- Corporate Banking - An Introduction
- Corporate Banking - Marketplace
- Corporate Banking Products - An Introduction
- Corporate Banking Relationship Management - An Introduction
- Corporate Banking Relationship Management in Practice

Interest Rate Mathematics

- Interest Calculations
- Day Count Conventions
- Interest Calculations - Scenario
- Present Value & Future Value
- Annuities & Perpetuities
- Time Value of Money - Scenario
- NPV & IRR
- NPV & IRR - Scenario

Building Blocks

Probability
Distributions & Hypothesis Testing
Estimating Volatility
Correlation & Regression Analysis
Calculus
Indices, Exponents, Logs, & Geometric Series

Building Blocks in Excel

- Logs - Excel Interactive
- Mean, Median, & Mode - Excel Interactive
- Volatility - Excel Interactive
- Normal Distribution - Excel Interactive
- Skewness & Kurtosis - Excel Interactive
- Correlation & Covariance - Excel Interactive
- Regression Analysis - Excel Interactive

Excel Techniques

- Menus & Shortcut Basics - Excel Interactive
- Formulas & Calculation Functions (Part 1) - Excel Interactive
- Formulas & Calculation Functions (Part 2) - Excel Interactive
- Naming & Referencing Cells - Excel Interactive
- Formatting Basics - Excel Interactive
- Pivot Tables - Excel Interactive (*New*)
- Lookup Functions - Excel Interactive (*New*)

Money Markets

- Interbank Market
- Interest Rates & Benchmarks
- Money Market Securities - An Introduction
- Money Market Securities - Pricing
- Repurchase Agreements (Repos)
- Money Market Funds
- Bank Funding & Position Management
- Money Market Trading - Scenario

Foreign Exchange

- The Foreign Exchange Business
- FX Spot Market - An Introduction
- FX Spot Market - Trading
- FX Forward Market - An Introduction
- FX Forward Market - Calculating Swap/Forward Points & Cross Rates
- FX Forward Market - Uses of Outrights & FX Swaps
- FX Forward Market - Short-Dated Outrights & FX Swaps
- FX Forward Market - Cross-Currency Borrowing & Investing
- FX Forward Market - FX Swap Trading
- FX Forward Market - Non-Deliverable Forwards (NDFs)
- Foreign Exchange - Factors Influencing Exchange Rates
- FX Swaps & Outrights - Scenario

Equity Valuation & Analysis

- Equity Valuation - An Introduction
- Industry & Company Analysis
- Equity Returns Analysis
- Equity Valuation - DCF Models
- Equity Valuation - Other Methods

Equity Trading

- Equity Trading - An Introduction
- Equity Indices
- Equity Trading - Technical vs. Fundamental Trading
- Equity Trading Strategies
- Equity Hedging
- Dark Pools
- Algorithmic Trading
- High Frequency Trading (HFT)

Equity Markets

- US Equity Market (*New*)
- UK Equity Market (*New*)
- European Equity Market (*New*)
- Japanese Equity Market
- Hong Kong Equity Market
- Singapore Equity Market
- Canadian Equity Market

Fixed Income Analysis

- Fixed Income Analysis - An Introduction
- Bond Prices & Yields - Excel Interactive
- Yield Curves - An Introduction
- Yield Curves - Construction
- Yield Curves - Excel Interactive
- Zero-Coupon Securities
- Duration Analysis
- Convexity Analysis
- Fixed Income Analysis - Credit Risk
- High Yield Debt
- Floating Rate Notes (FRNs)
- Option-Linked Securities
- Inflation-Linked Securities
- Fixed Income Derivatives

Fixed Income Strategies

Bond Strategies - Fundamentals
Relative Value Trading - An Introduction
Relative Value Trading - Strategies & Risks
Bond Hedging with Options
Bond Hedging with Swaps

Bond Markets

- US Bond Market (*New*)
- UK Bond Market (*New*)
- European Bond Market (*New*)
- Japanese Bond Market
- Canadian Bond Market
- Eurobonds - An Introduction
- Eurobonds - Issuing & Investing

Municipal Bonds (US)

Municipal Bonds (US) - An Introduction
Municipal Bonds (US) - Types
Municipal Bonds (US) - Investing
Municipal Bonds (US) - Primary & Secondary Markets

Introduction to Derivatives

- Derivatives - An Introduction
- Derivatives - Markets
- Forwards & Futures - An Introduction
- Swaps - An Introduction
- Options - An Introduction
- Derivatives Applications - Scenario

Forwards & Futures

Forwards & Futures - Pricing
Futures Markets
Forwards & Futures - Hedging (Part I)
Forwards & Futures - Hedging (Part II)
Forwards & Futures - Trading
Money Market Futures
Bond Futures
Bond Futures Basis
Basis Trading

Options

- Option Valuation - An Introduction
- Option Valuation - Key Concepts
- Option Valuation - Sensitivities & Outcomes
- Option Valuation - Future Asset Prices & Volatility
- Option Valuation - Black-Scholes-Merton
- Option Valuation - American Options
- Option Valuation - Binomial Techniques
- Option Valuation - Monte Carlo Methods
- Option Greeks - Measuring Delta & Gamma
- Option Greeks - Using Delta & Gamma
- Option Greeks - Vega, Theta, & Rho
- Option Greeks - Second-Order Sensitivities
- Option Trading - Combination Strategies
- Option Trading - Spread Strategies
- Option Trading - Managing an Options Portfolio

Interest Rate & FX Options

Caps & Floors - An Introduction
Caps & Floors - Pricing
Caps & Floors - Chooser & Double-Strike Structures
Swaptions
Bermudan Swaptions
Interest Rate Volatility
Options - Managing an Interest Rate Option Book
FX Option Trading

Exotic Options

- Options - Exotic Options
- Options - Barrier Options
- Options - Average Rate Options
- Options - Basket & Spread Options - An Introduction
- Options - Basket Options - Evaluation & Evolution

Swaps

- Swaps - Applications
- Swaps Applications for Corporates - Scenario
- Swaps Applications for Institutional Investors - Scenario
- Swaps - Impact of the Financial Crisis
- Swaps - Clearing
- Swaps - Documentation
- Swaps - Key Valuation Concepts *(New)*
- Swaps - Cash Flows & Structures *(New)*
- Swaps - Indices & Curves *(New)*
- Swaps - Pricing *(New)*
- Swaps - Bootstrapping Zero Curves *(New)*
- Swaps - Sensitivities & Risk Management *(New)*
- Swaps - Basis Swaps *(New)*
- Swaps - Currency Swaps *(New)*
- Swaps - Overnight Index Swaps (OIS) *(New)*
- Swaps - Asset Swaps *(New)*
- Swaps - CSAs & Collateral *(New)*
- Swaps - Exotic Structures *(New)*
- Swaps - Book Management *(New)*

Equity Derivatives

- Equity Derivatives - An Introduction
- Equity Options & Warrants
- Equity Index Futures & Options
- Equity Swaps

Contracts for Difference

- Contracts for Difference (CFDs)

Hybrid Securities

- Convertibles - An Introduction
- Convertibles - Valuation
- Contingent Convertibles (CoCos)

Credit Derivatives

- Credit Derivatives - An Introduction
- Credit Derivatives - Single-Name CDS
- Credit Derivatives - CDS Indices
- Credit Derivatives - CDS Valuation
- Credit Derivatives - CDS Documentation & Settlement
- Credit Derivatives - Variations
- CDS Relative Value Trading - Scenario

Securitization

- Securitization - An Introduction
- Securitization - Mortgage-Backed Securities (MBS)
- Securitization - European Mortgage-Backed Securities
- Securitization - Commercial Mortgage-Backed Securities
- Securitization - Asset-Backed Securities (ABS)
- Securitization - Credit Card ABS
- Securitization - CDOs - An Introduction
- Securitization - CDOs - Structures & Ratings

Structured Derivative Notes & Swaps

- Range Accrual Structures
- Inverse FRNs
- Capped & Collared FRNs
- Trigger Structures
- Power Reverse Dual Currency (PRDC) Notes
- Target Redemption Notes (TARNs)
- CMS Option Structures

Corporate Finance

- Corporate Finance - An Introduction
- Corporate Finance - Capital Structure & Liquidity
- Corporate Finance - Cost of Capital
- Corporate Finance - Raising Capital
- Corporate Finance - Project Appraisal & Capital Budgeting
- Corporate Finance - Measuring Business Performance
- Corporate Finance - Payout Policy
- Mergers & Acquisitions (M&A) - An Introduction
- Mergers & Acquisitions (M&A) - Analysis
- Corporate Finance - Scenario

Financial Statement Analysis

- Accounting - An Introduction
- Accounting Mechanics - Scenario
- Balance Sheet - An Introduction
- Balance Sheet - Analysis
- Income Statement - An Introduction
- Income Statement - Analysis
- Statement of Cash Flows - An Introduction
- Statement of Cash Flows - Analysis
- Three-Statement Modeling

Corporate Valuation

- Corporate Valuation - An Introduction
- Corporate Valuation - Trading Comparables
- Corporate Valuation - Transaction Comparables
- Corporate Valuation - DCF Analysis
- Corporate Valuation - LBO Analysis
- LBO Model Building - Excel Interactive
- Corporate Valuation - Merger Analysis
- Merger Model Building - Excel Interactive

Bank ALM & Treasury Management

- Bank Balance Sheets
- ALM & Treasury Management - An Introduction
- ALM - Strategic ALM
- ALM - Tools & Techniques
- ALM & Treasury Operations
- Treasury Cash Management - Scenario

Banking Risk Management

- Risk - Primer
- Risk Management - An Introduction
- Risk Management - Risk Types & Measurement
- Risk Management - Risk Modeling
- Risk Management - Business Strategy & Risk Decision-Making
- Risk Management - Tools & Techniques
- Stress Testing - An Introduction
- Stress Testing in Practice
- Risk Management - Reporting

Market Risk Management

- Market Risk - An Introduction
- Market Risk - Measurement
- Market Risk - Management
- VaR & Expected Shortfall - An Introduction
- VaR & Expected Shortfall - Measurement

Interest Rate Risk Management

- Interest Rate Risk - An Introduction
- Interest Rate Risk - Measurement
- Interest Rate Risk - Management

Liquidity Risk Management

- Liquidity Risk - An Introduction
- Liquidity Risk - Measurement
- Liquidity Risk - Management

Counterparty Credit Risk Management

- Counterparty Credit Risk (CCR) - An Introduction
- Counterparty Credit Risk (CCR) - Measurement
- Counterparty Credit Risk (CCR) - Management

Operational Risk Management

- Operational Risk - An Introduction
- Operational Risk - Measurement & Reporting
- Operational Risk Management - Tools & Techniques
- Operational Risk Management - Developments & Emerging Risks

Introduction to Credit Risk

- Credit Risk - An Introduction
- Credit Risk - Types
- Credit Risk - Measurement & Capital Requirements
- Credit Risk - Lessons from the Financial Crisis

Credit Risk Management

- Credit Risk Management - An Introduction
- Credit Risk Management - Framework
- Credit Risk Management - Stakeholders
- Credit Risk Management - Strategic & Business Unit Management
- Credit Risk Management - Credit Culture
- Credit Risk Management - Risk/Reward
- Credit Risk Management - Data & Reporting

Credit Risk Appetite

- Credit Risk Appetite - An Introduction
- Credit Risk Appetite - Customer & Industry Risk
- Credit Risk Appetite - Product & Country Risk

Credit Risk Measurement

- Credit Risk Measurement - An Introduction
- Credit Risk Measurement - PD & Risk Rating
- Credit Risk Measurement - EAD & LGD
- Credit Risk Measurement - Capital Calculations
- Credit Risk Measurement - Models

Credit Risk Customer Management

- Credit Risk Customer Management - An Introduction
- Credit Risk Customer Management - Credit Facilities
- Credit Risk Customer Management - Structuring Credit Facilities
- Credit Risk Customer Management - Covenants & Credit Decisions

Credit Analysis

- Credit Analysis - An Introduction
- Credit Analysis - Balance Sheet Analysis
- Credit Analysis - Income Statement Analysis
- Credit Analysis - Cash Flow Analysis
- Credit Analysis - Performance & Other Measures
- Credit Analysis - Forecasting
- Credit Analysis - Other Factors
- Credit Analysis - Scenario

Credit Risk Mitigation

- Credit Risk Mitigation - An Introduction
- Credit Risk Mitigation - Collateralization
- Credit Risk Mitigation - Other Types of Mitigant
- Credit Risk Mitigation - Management & Realization

Problem Credit Management

- Problem Credit Management - An Introduction
- Problem Credit Management - Early Stage Problem Credits
- Problem Credit Management - Late Stage Problem Credits
- Problem Credit Management - Accounting for Problem Credits

Corporate Banking Products (Credit)

- Corporate Banking Products - Short-Term Finance
- Corporate Banking Products - Accounts Receivable Finance
- Corporate Banking Products - Term Finance
- Corporate Banking Products - Asset-Based Finance
- Corporate Banking Products - Trade Finance
- Corporate Banking Products - Syndicated Lending

Corporate Banking Products (Noncredit)

- Corporate Banking Products - Cash Management
- Corporate Banking Products - Payments
- Corporate Banking Products - Risk Management
- Corporate Banking & Interest Rate Risk - Scenario
- Corporate Banking Products - Advisory & Other Services

Project Finance

- Project Finance - An Introduction
- Project Finance - Deal Structuring

Trade Finance

- Trade Finance - An Introduction
- Open Account Trading
- Documentary Collections
- Letters of Credit - An Introduction
- Letters of Credit - Types
- UCP 600
- Export Finance
- Structured Trade Finance
- Trade Finance Security
- Incoterms 2010

Loan Trading

- Loan Trading

Life of a Trade

- Life of a Trade - An Introduction
- Life of a Trade - Pre-Trade
- Life of a Trade - Execution
- Life of a Trade - Clearing & Settlement
- Life of a Trade - Ongoing Position & Risk Management
- Life of a Trade - Scenario

Custody & Fund Services

- Custody - An Introduction
- Corporate Actions - An Introduction
- Corporate Actions - Types
- Shareholder Servicing
- Fund Types & Structures
- Fund Administration
- Fund Valuation

Prime Brokerage

- Prime Brokerage - An Introduction
- Prime Brokerage - The Prime Broker's Viewpoint
- Prime Brokerage - The Institution's Viewpoint

Commodities

- Commodities - An Introduction
- Commodities - Trading

- Commodities - Gold & Other Precious Metals
- Commodities - Oil
- Commodities - Natural Gas
- Commodities - Coal
- Commodities - Electricity
- Commodities - Non-Ferrous Metals
- Commodities - Ferrous Metals
- Commodities - Grains & Oilseeds
- Commodities - Livestock
- Commodities - Softs
- Commodities - Emissions

Global Financial Regulation

- Financial Regulation - An Introduction
- Financial Authorities (US)
- Financial Authorities (UK) - PRA & FCA
- Financial Authorities (UK) - Bank of England
- Financial Authorities (Europe) - ECB
- Financial Authorities (Europe) - ESFS
- Financial Authorities (Japan)
- Financial Authorities (Hong Kong)
- Financial Authorities (Singapore)
- Financial Authorities (China)

Basel Framework

- Basel III - An Introduction (*New*)
- Basel III - Pillar 1 & Capital Adequacy (*New*)
- Basel III - Measurement Approaches (*New*)
- Basel III - Liquidity & Leverage (*New*)
- Basel III - Pillar 2 & ICAAP (*New*)
- Basel III - Pillar 3 & Risk Reporting (*New*)

US Regulation

- Dodd-Frank Act - An Overview
- FATCA

European Regulation

- MiFID II/MiFIR - Primer
- MiFID II/MiFIR - Key Requirements
- European Market Infrastructure Regulation (EMIR)
- UCITS
- AIFM Directive

Islamic Banking & Finance

- Islamic Banking & Finance - An Introduction
- Islamic Banking & Finance - Financial Instruments
- Islamic Money & Capital Markets
- Sukuk Market
- Islamic Banking & Finance - Wealth Management

Economic Analysis

- Economic Indicators - An Introduction
- Macroeconomics - Gross Domestic Product (GDP)
- Economic Indicators - National Accounts
- Economic Indicators - Business Cycles
- Macroeconomics - Inflation
- Macroeconomics - Unemployment
- Economic Indicators - Inflation & Employment
- Monetary Policy
- Macroeconomics - Fiscal Policy
- Macroeconomics - Balance of Payments

Technical Analysis

- Technical Analysis - An Introduction
- Technical Analysis - Fibonacci Analysis & Elliot Wave Theory
- Technical Analysis - Trend-Following Strategies
- Technical Analysis - Mean-Reverting Strategies
- Technical Analysis - Other Strategies

Introduction to Asset Management

- Investment - An Introduction
- Asset Management - An Introduction

Portfolio Theory & Practice

- Risk & Return - An Introduction
- Risk & Return - Portfolios
- Risk & Return - Efficient & Optimal Portfolios
- Capital Asset Pricing Model (CAPM)
- APT & Factor Models
- Factor-Based Investing - Primer
- Efficient Markets
- Portfolio Management - Passive vs. Active Approaches
- Portfolio Management - Behavioral Theory
- Portfolio Performance - Measures
- Portfolio Performance - Attribution Analysis

Asset Allocation & Portfolio Construction

- Asset Allocation - An Introduction
- Strategic Asset Allocation (SAA)
- Tactical Asset Allocation (TAA)
- Asset Allocation - Scenario
- Investment Policy Statements

Asset Classes

- Asset Classes - Primer
- Asset Classes & Investing
- Asset Classes - Types

Understanding Private Wealth Management Business

- Private Wealth Management - An Introduction
- Private Wealth Management - Clients
- Private Wealth Management - Ultra-HNWs & Family Offices
- Private Wealth Management - Client Investment & Wealth Allocation
- Private Wealth Management - Client Acquisition & Relationship Management
- Private Wealth Management - Becoming a Trusted Advisor
- Private Wealth Management - Behavioral Finance
- Private Wealth Management - Compliance Considerations

Private Wealth Management Products & Services

- Private Wealth Management - Banking & Deposit Services
- Private Wealth Management - Credit & Lending Services
- Private Wealth Management - Investment Services
- Private Wealth Management - Alternative Investments
- Private Wealth Management - Financial Planning
- Private Wealth Management - Estate Planning
- Private Wealth Management - Scenario

Exchange-Traded Funds (ETFs)

- Exchange-Traded Funds (ETFs) - An Introduction
- Exchange-Traded Funds (ETFs) - Types
- Smart Beta - Primer

Investment Companies (US)

- Mutual Funds (US) - An Introduction
- Mutual Funds (US) - Investing
- Mutual Funds (US) - Types
- Closed-End Funds (US)
- Unit Investment Trusts (US)

Collective Investment Schemes (UK)

- Collective Investment Schemes (UK)

Alternative Assets

- Alternative Assets - An Introduction
- Structured Products - An Introduction
- Structured Products - Major Types
- Structured Products - Valuation & Risks
- Liquid Alternatives

Hedge Funds

- Hedge Funds - An Introduction
- Hedge Funds - Investing
- Hedge Funds - Strategies

Private Equity

- Private Equity - An Introduction
- Private Equity - Investing

Real Estate

- Real Estate - An Introduction
- Real Estate - Investing
- Real Estate - Valuation

Financial Management

- Budgeting *(New)*
- Working Capital Management *(New)*
- Cash Management *(New)*
- Credit Management *(New)*
- Financial Planning & Modeling *(New)*
- Financial Management - Scenario *(New)*

Emerging Markets

- Emerging Markets - An Introduction
- Emerging Markets - China

Securities Lending

- Securities Lending - An Introduction
- Securities Lending - Collateral & Risk Management

Transaction Banking

- Transaction Banking - An Introduction
- Transaction Banking - Payments Services
- Transaction Banking - Cash Management Services
- Transaction Banking - Regulatory Influences

Corporate Governance

- Corporate Governance - An Introduction
- Corporate Social Responsibility (CSR) - An Introduction

Socially Responsible Investing (SRI)

- Socially Responsible Investing (SRI) - An Introduction
- Green Investing - An Introduction

Global Financial Crisis

- The Financial Crisis

Other Courses (Optional)*

FinTech

- Bitcoin & Blockchain
- Blockchain Structure & Security
- Smart Contracts & Blockchain Applications
- Cryptocurrencies & Initial Coin Offerings (ICOs)
- Data Analytics
- Robotic Process Automation (RPA)
- Artificial Intelligence (AI)
- Robo-Advice
- Internet of Things (IoT)
- Enterprise Resource Planning (ERP)

Consumer (Retail) Banking

- Consumer Banking - An Introduction
- Consumer Banking - Products
- Branch Banking
- Banking Channel Management
- Consumer Banking - Marketing
- Consumer Banking - Selling
- Consumer Banking - Customer Service
- Consumer Payments - An Introduction
- Advanced Payment Methods
- Card Issuing - An Introduction
- Cards & Payments - Merchant Acquiring
- Cards - Marketing

Dodd-Frank Act

- Dodd-Frank Act - New Offices Created
- Dodd-Frank Act - Capital Requirements & Prudential Standards
- Dodd-Frank Act - The Volcker Rule
- Dodd-Frank Act - Registration Requirement for Advisers to Private Investment Funds
- Dodd-Frank Act - Credit Rating Agencies
- Dodd-Frank Act - Securitization
- Dodd-Frank Act - OTC Derivatives

UK Compliance

- UK Anti-Money Laundering (AML)
- UK Conduct Regime
- UK Individual Accountability Regime (IAR) - Certified Persons
- UK Market Abuse
- UK Cybersecurity
- UK Anti-Bribery & Corruption (ABC)
- UK CASS Regime

Other Regulation/Compliance

- US Anti-Money Laundering (AML)
- Foreign Corrupt Practices Act (FCPA)
- Singapore Anti-Money Laundering (AML)
- Hong Kong Anti-Money Laundering (AML)
- Ireland Anti-Money Laundering (AML)
- UAE Anti-Money Laundering (AML)
- GDPR
- Solvency II
- Anti-Bribery & Corruption (ABC) in Asia
- Combating Rogue Trading

* For more information, please contact your local regional office.

Professional Skills

Awareness

- Diversity
- Equality
- Sexual Harassment - Recognize, Respond, Respect
- Workplace Bullying
- Health & Safety

The Effective Manager

- Effective Decision Making
- Effective Objective Setting**
- Effective Delegation
- Effective Motivation**
- Effective Coaching**
- Effective Management of Change**
- Effective Team Building**
- Effective Team Leadership
- Managing Problem Performance
- Effective Time Management**
- Effective Meetings
- Effective Communications

** These tutorials are also available to purchase in Spanish (Colombian/Argentinian), Portuguese (Brazilian), Dutch, and Italian.

Project Management Fundamentals

- Overview of Project Management
- Initiating a Project
- Planning Project Scope
- Planning Project Activities
- Planning Project Costs
- Executing a Project
- Controlling a Project
- Closing a Project

Project Management Professional

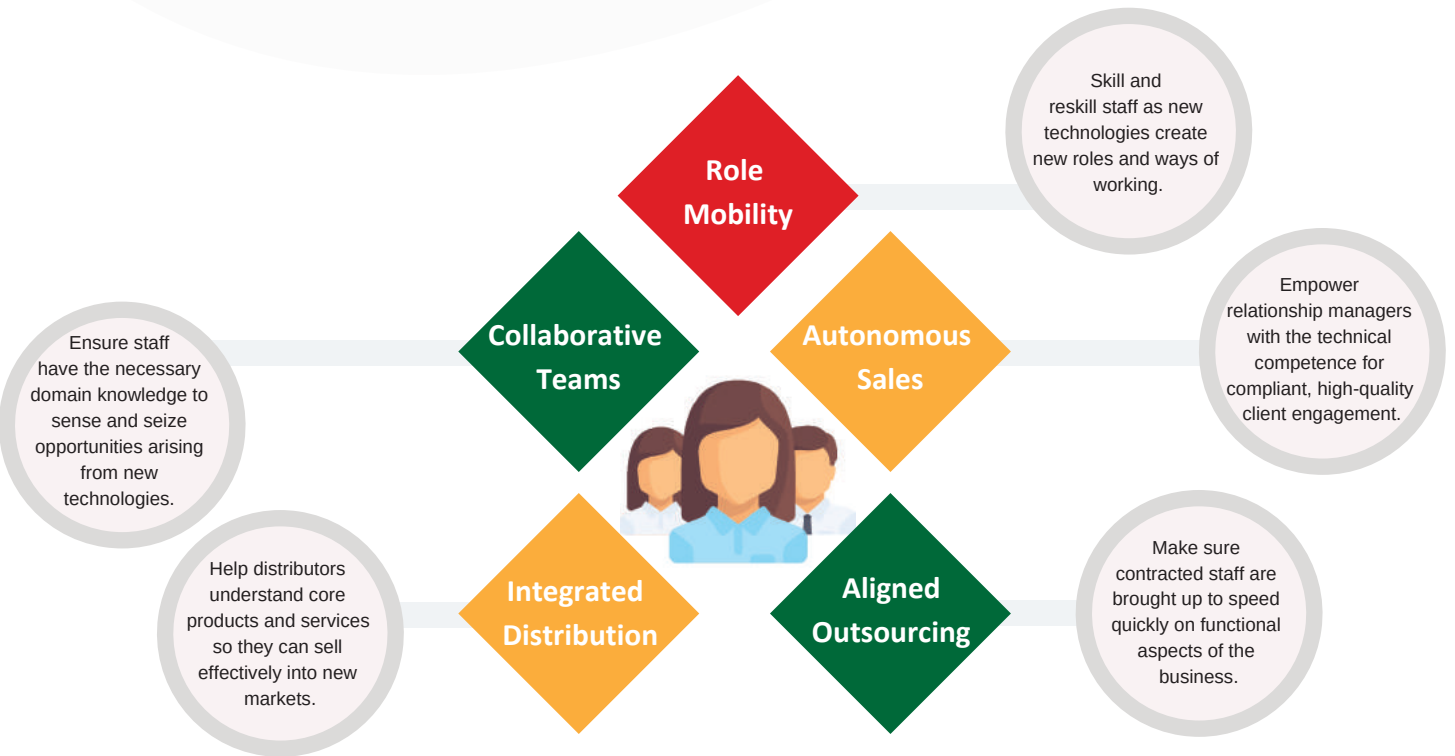
- Integration Management
- Scope Management
- Time Management I
- Time Management II
- Cost Management
- Quality Management
- Human Resources Management
- Communications Management
- Procurement Management

Sales Skills

- Sales - Prospecting
- Sales - Selling Value
- Sales - Building Rapport & Call Introduction
- Sales - Developing a Sales Solution
- Sales - Selling the Benefits
- Sales - Closing & Negotiating
- Sales - After the Sale
- Sales - Client Needs & the Sales Cycle

Workforce Agility in the Age of Digital Transformation

Find out how firms are leveraging Know-How to meet demand for a more agile workforce.



For more information on how Intuition Know-How can help your organization manage digital transformation, contact your local Intuition Account Manager or info@intuition.com.

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