



اتحاد شركات الاستثمار
UNION OF INVESTMENT COMPANIES

ETFs Creation for Professionals

Investment Studies Center (ISC) @ Union of Investment Companies, is delighted to invite you to a training program that will provide participants with a comprehensive understanding of the process involved in creating an ETF, including regulatory requirements, portfolio construction, and distribution strategies, according to the following details:

يسر مركز دراسات الاستثمار لدى اتحاد شركات الاستثمار الإعلان عن تنظيم برنامج تدريبي ودعوتكم للمشاركة فيه والذي سيزود المشاركين بفهم شامل للعملية التي ينطوي عليها إنشاء صندوق استثمار متداول، بما في ذلك المتطلبات التنظيمية، وبناء المحفظة، واستراتيجيات التوزيع، وذلك يتم وفقاً للتفاصيل الآتية:

Training Program: ETFs Creation for Professionals البرنامج التدريبي:

Instructor: Alaa Ghanem المحاضر:

Dates: (Wednesday & Thursday), 13th & 14th November 2024 (3 Days) التاريخ:

Timing: 09:00AM - 03:00PM الوقت:

Language: Arabic/material in English لغة البرنامج:

Venue: In-person @ UIC premises المكان:

Course Details, Registration & Fees in link below تفاصيل البرنامج، التسجيل والرسوم في الرابط أدناه

<http://unioninvest.org/upcomingevents.aspx>

Registration is open according to availability

Discounted Fees for UIC Members KWD 180 الرسوم بعد الخصم لأعضاء الاتحاد

Non-Members KWD 230 غير أعضاء الاتحاد

ETFs Creation for Professionals

Introduction:

As professionals in the finance industry, it is crucial to stay updated and knowledgeable about the latest trends and developments. One area that has gained significant attention in recent years is Exchange-Traded Funds (ETFs). These investment vehicles have become increasingly popular due to their low costs, diversification benefits, and liquidity. However, creating ETFs requires a specialized skill set that not all professionals possess.

That is why enrolling in a training course on ETF creation is essential for professionals looking to enhance their expertise in this area. This training will provide participants with a comprehensive understanding of the process involved in creating an ETF, including regulatory requirements, portfolio construction, and distribution strategies. By completing this training program, professionals will be better equipped to advise clients on investing in ETFs, design innovative investment products, and potentially advance their careers within the finance industry. The knowledge gained from this course will not only benefit individuals but also contribute to the overall growth and success of their organizations.

Attending a training program on ETF creation for professionals is a wise decision that can lead to numerous opportunities for career advancement and professional growth. Don't miss out on this chance to expand your knowledge and expertise in one of the fastest-growing sectors of the finance industry.

Outline:

1. ETF Creation

- ❖ Overview
- ❖ ETFs vs Mutual Funds
- ❖ Redemption
- ❖ ETFs in Kuwait



2. Potential Types of ETFs

- ❖ Equity
- ❖ Fixed Income
- ❖ Commodity
- ❖ Currency
- ❖ Real Estate
- ❖ Specialty

3. Management Strategies

- ❖ Passive
- ❖ Active
- ❖ Semi-Active
- ❖ Contrarian and Inverse ETF
- ❖ Leveraged ETF

4. Advantages

- ❖ Access
- ❖ Risk Management
- ❖ Lower Capital from Investors
- ❖ Others

5. Disadvantages

- ❖ Fees
- ❖ Liquidity
- ❖ Mis-management
- ❖ Others

6. Valuation

7. Important comments

- ❖ ETFs can fill specific niches in your market
- ❖ ETFs play important roles in an investment portfolio



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Skills Gained:

- ❖ Investment
- ❖ ETF
- ❖ Risk assessment
- ❖ Fundamental analysis
- ❖ Analytical skills

Target Audience:

- ❖ Fund Managers
- ❖ Portfolio Managers
- ❖ Investment Analysts
- ❖ Financial Advisors
- ❖ Traders
- ❖ Institutional Investors
- ❖ Product Development Professionals



Expert's Profile: Alaa Ghanem

Alaa Ghanem is the CEO of Advisory and Business Company. Alaa has more than 16 years of experience at international and regional conglomerates. He developed and established the financial and equity research departments and the economic advisory units in leading companies in the MENA region like Bank Audi. He participated in tens of financial and economic global conferences and wrote thousands of investment notes and research papers that were published by international and regional newspapers like Bloomberg and Zawya. Alaa graduated in 2007 with distinction from the Lebanese American University in collaboration with George Washington University in USA, with double major in Finance and Economics. He completed his CVA in 2008 and his CFA in 2009. Alaa attended several executive education courses at INSEAD University, University of Cambridge and Yale University.