



Market Trends: Cause and Effect on Portfolios

In this one-day, hands-on computer workshop, participants will use the Internet to collect data and then select a security to buy. New investment vehicles allow participants to buy gold bullion as well as equities, bonds, foreign currencies and other hard assets. Starting with a definition of the US treasury yield curve, this workshop progresses to selecting a specific investment to buy for one's personal or professional portfolio. In addition to gathering Federal Reserve data and technical indicators from the Internet, it provides benchmarks for evaluating this information. No math is required.

Available Session(s):

19-Sep-2008 -- 19-Sep-2008 New York USD \$1475

NY Institute of Finance - 9:00am - 4:30pm Fri
Midtown

Instructor(s):[Deborah Weir;]

22-Oct-2008 -- 22-Oct-2008 Stamford USD \$1475

NY Institute of Finance - 9:00am - 4:30pm Wed
Stamford, CT

Instructor(s):[Deborah Weir;]

Targeted Audience

Anyone who must forecast the economy or the direction of the stock market, manages his own or others' portfolios, or who supports portfolio managers.

Advance Preparation

No advance preparation required.

Prerequisites

Attendees must have some basic skill in navigating the Internet. A basic understanding of the Federal Reserve System is helpful. Math is not required.

Learning Objectives

Students will be able to:

- Demonstrate a practical understanding of the core concepts of asset allocation and security selection
- Develop hands-on Internet skills with specific web sites for locating data
- Build a specific model for allocating assets among fixed income, equities, hard assets, foreign currencies
- Demonstrate application of these skills to forecast the direction of the economy and the stock market
- Select a specific security to buy for one's personal portfolio or for a professional portfolio at work

Alumni Comments

"Mrs. Weir is an excellent instructor. I enjoyed this course immensely."

Follow-Up Courses

Securities Analysis - Day

Securities Analysis - Evening

Fusion Analysis Suite

Fusion Analysis - Day/Evening

Options Volatility Trading - Intensive (Day)

Level: Basic

CPE Credits: 7.0

Instructional Method: Group-Live

Detailed Outline

Morning: Forecasting the Economy and the Stock Market

Session 1: US Treasury Yield Curves

- Define the yield curve, understand its importance and locate data sources
- Understand the Federal Reserve and how it uses the shape of the yield curve to forecast the economy one year ahead. (Compute GDP for one year from today.)
- Define bond quality spreads, find data sources, and use them to provide a shorter-term stock market forecast.
- Explore Federal Reserve open market operations' affect on asset classes
- Find data on the Internet.
- Post data on a worksheet.
- Compare data to benchmarks for evaluation.

Session 2: Technical Analysis

- Examine traditional technical indicators and locate on the Internet.
- Develop proprietary measures of stock market breadth and identify information sources
- Find data on the Internet.
- Post data on a worksheet.
- Compare data to benchmarks for evaluation.

Afternoon: Security Selection

Session 1: Sector Selection Using the Yield Curve

- Examine theory of sector rotation
- Locate sources of data
- Apply to security selection

Session 2: Security Selection

- Define terms for exchange-traded funds
- Compare cost/benefit of ETF's and mutual funds
- Select a security or an option to buy
- Post investment decision (if desired) and rationale on a blog:
<http://timingthemarket.blogspot.com>

For more information regarding administrative policies such as complaints and refunds, please contact our offices at 212-641-6616.