



Mutual Funds - Online

An excellent introduction to the global mutual fund industry, this course explores the types of mutual funds, the fund selection process, and the structure of mutual fund companies. As the popularity of mutual funds explodes, this course also examines the trends that are shaping the industry, including indexation, exchange-traded funds and the booming retirement market.

This is an asynchronous eLearning course that can be accessed 24/7 from any internet enabled computer. Subscription period for this course is 90 days.

Available Session(s):

Available Today

Online

USD \$499

Online

Instructor(s):[]

Targeted Audience

Entry-level analysts, institutional salespersons and traders, aspiring portfolio managers, individual investors.

Advance Preparation

No advance preparation required.

Prerequisites

None

Learning Objectives

Students will be able to:

- Recognize key points in the historical development of mutual funds and the significance of their global popularity among investors
- Identify the definition and features of mutual funds and of the associated net asset value, fund families, and investment minimums
- Identify specific guidelines and safeguards afforded investors who invest in mutual funds
- Recognize or briefly describe benefits and drawbacks of mutual funds

- Distinguish between equity and fixed-income funds
- Identify the different types of hybrid funds
- Describe how close-ended funds differ from open-ended funds
- Identify alternatives to mutual funds
- Align an investor's objectives with the objectives of income and growth funds.
- Recognize how tolerance for risk affects your asset allocation and selection of mutual funds.
- Identify the key factors that differentiate mutual funds and the importance of researching them
- Identify the role of the major players in a mutual fund company
- Recognize the fees that the mutual fund company charges investors
- Recall the steps in the process of buying and redeeming mutual fund shares
- Describe how the mutual fund industry is affected by the current investment trends of the
- Explain defined contribution plans and evidence of their global growth and popularity
- Recognize characteristics of the new types of mutual funds that have developed in response to recent investor demand
- Identify new Distribution Channels for mutual funds
- Contrast the advantages and disadvantages of global deregulation

Follow-Up Courses

Hedge Funds - Online

Level: Basic

CPE Credits: 10

Instructional Method: Self-Study

Detailed Outline

Understanding mutual funds

- Industry overview and brief history
- Net asset value
- Fund families
- Benefits and drawbacks of mutual funds

Various fund products

- Equity and fixed income mutual funds
- Hybrid securities
- Multifunds
- Closed-end funds
- Alternatives to mutual funds

Selecting the right fund

- Understanding fund objectives
- Determining risk tolerance
- Deciding asset allocation
- Researching funds
- Small-cap vs. large cap and value vs. growth

How a mutual fund company operates

- Organization of mutual funds
- Open-end fund structure
- Participants in a mutual fund
- Fund fee structures
- Buying and redeeming shares

Trends in the Industry

- Boom in the industry
- Shift to Defined-Contribution pension plans
- Developments in fund types
- Distribution channels
- Global deregulation
- Future of global mutual fund investing

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