



## Money Markets and Portfolio Management - Online

This module will take a look at the products in which fund managers invest. Keep in mind, the skill of the fund manager is not only in being able to pick a winning portfolio, but to choose investments that match the investor's profile.

This course replicates the content from lesson 3 of Portfolio Management I - Online.

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.

### Targeted Audience

Junior portfolio managers, money managers, research analysts, client services staff, consultants, individual and institutional investors, private bankers and financial advisors, research staff members of pension boards and plan sponsors.

### Advance Preparation

No advance preparation required.

### Learning Objectives

Students will be able to:

- . Compare and contrast different types of money market funds, and discuss the specific advantages and disadvantages of each
- . Calculate the bank discount basis and bond equivalent yields on a Treasury Bill
- . Select the best investment vehicle to meet a hypothetical client's needs

### Follow-Up Courses

The Institutional Investor - Online

The Individual Investor - Online

Money Markets and Portfolio Management - Online

Managing Portfolios with Equities - Online

Advanced Equity Valuation Techniques - Online

**Level: Basic**

**CPE Credits: 1**

**Instructional Method: Self-Study**

## **Detailed Outline**

### **Money Markets and Portfolio Management**

#### **Topics covered include:**

- . Different types of money market funds
- . Advantages and disadvantages of different types of money market funds
- . Government treasury bills including bank discount basis and bond equivalent yields
- . Selecting investment vehicles based on the needs of a hypothetical client

Duration: 1 hour

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