



Selecting the Right Mutual Fund - 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 course replicates the content from lesson 3 of Mutual Funds - 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.

Available Session(s):

Available Today

Online

USD \$120.00

Online

Instructor(s):[]

Targeted Audience

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

Advance Preparation

No advance preparation required.

Learning Objectives

Students will be able to:

- 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.

Level: Basic

CPE Credits: 2

Instructional Method: Self-Study

Detailed Outline

Selecting the Right Mutual Fund

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

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