



(A SIDC CPE-approved course)

Using the Core-Satellite Approach in Portfolio Asset Allocation

Event Details

Date: 28 March 2015, Saturday (Full Day)

Venue: Symphony Suites Hotel, Ipoh

CE/CPD/CPE: 10 CE Point / 10 CPD Points / 8 CPE Points

Instructor: En. Sani Hamid

Learning Outcome

By attending the course, participants will be able to:

1. Describe the Core-Satellite Approach in creating an investment portfolio
2. Identify the use of the Core-Satellite Approach by key market players
3. Compare the different strategies used in Core-Satellite portfolios
4. Demonstrate the development of an investment process within the Core-Satellite Approach
5. Construct a portfolio using the Core-Satellite Approach for prospective clients

Profile of En. Sani Hamid

Bachelor in Business (Hon.), Nanyang Technological University; Masters in Social Science in Applied Economics, National University of Singapore; Certificate in Islamic Banking & Finance, International Islamic University of Malaysia; Certified Financial Planner.

Sani Hamid currently holds the position of Director (Economy & Market Strategy) in Financial Alliance Pte Ltd, a leading and award-winning Independent Financial Advisory Firm in Singapore. He is also a Director of FA Advisory Sdn Bhd, a fully licensed Financial Advisory firm in Malaysia and is part of the Financial Alliance Group.

Sani has more than 20 years of working experience in the financial markets, having worked for companies such as S&P MMS where he led a team of analysts covering Emerging Asian economies; BNP Paribas Peregrine as a senior economist; and S&P Ratings as a Director in the sovereign team overseeing the ratings of countries such as Indonesia, India, Malaysia and Singapore.

Sani presently sits on the Investment Committee of the Majlis Ugama Islam Singapura (MUIS) and advises several Muslim Welfare Organizations on investment matters. He is actively involved with voluntary work with Muslim associations such as MUIS, Mendaki and others. He is also the advisor to the Debt Advisory Centre @ Association of Muslim Professionals.

CE Course Itinerary

Time	Function / Paper Title
8:30 - 9:00am	Registration
9:00 - 11:00am	Introduction to the Core-Satellite Approach <ul style="list-style-type: none">• What is the core-satellite approach• Advantage & disadvantage of this approach• Understanding asset allocation• Asset classes: Equities & Bonds• Understanding portfolios
11:00 - 11:15am	Coffee break
11:15 - 12:45am	Different strategies using the core-satellite approach <ul style="list-style-type: none">• The Traditional Strategy• Index-Active Management Strategy• Introducing Alternative investments
12:45 - 1:45pm	Lunch break
1:45 - 3:45pm	The Core-Satellite Approach: Determining the Core <ul style="list-style-type: none">• Environmental scan to set asset allocation• Determining the core allocation• Example on how to build an investment process based on scores
3:45 -4:00pm	Coffee break
4:00 - 5:00pm	The Core-Satellite Approach: Determining the Satellite <ul style="list-style-type: none">• How satellites are chosen?• Example of satellites
5:00 - 5:30pm	Summary <ul style="list-style-type: none">• Re-cap course topics• Discuss practical applications• Q&A session

CE COURSE REGISTRATION FORM

Title of Course:	Using the Core-Satellite Approach in Portfolio Asset Allocation
Speaker:	En. Sani Hamid
Date:	28 March 2015 / Saturday [Full day]
Venue:	Symphony Suites, Ipoh - 41, Lapangan Symphony Business Park, Jalan Lapangan Symphony, 31350 Ipoh Perak. Tel: 05-3122288
Registration:	8.30 am - 9.00 am
Time:	9.00 am - 5.30 pm
Fees:	<ul style="list-style-type: none"> • Early Bird Special (Payment by <u>6th March 2015</u>) RM 200 (FPAM Member), RM 250 (Public) • Normal Price - RM 250 (FPAM Member), RM 300 (Public) <i>Fee includes seminar materials, buffet lunch and refreshments.</i>
Instructions:	Please fill-up this form and fax to +605 2438828 or e-mail to lpohChapter@fpam.org.my
CE Points (FPAM): CPD (SIDC): CPE (FiMM):	Ten (10) Ten (10) Eight (8)
Payment/Invoice:	Payable by cheque to FPAM Ipoh Chapter . Kindly mail this registration form with your cheque to this address: 1 st Floor, 52 Persiaran Greenhill, 30450 Ipoh, Perak. OR Bank in to MBB account no. 508319212198. Kindly fax or email the bank in slip.
Terms:	Registration is on a first-come-first-served basis. Confirmation is subject to payment before the course. Walk-in participant/s will be admitted on the basis of space availability. FPAM reserves the right to amend the program, speaker, date, venue, etc, without prior notice.
Enquiries:	Email to lpohChapter@fpam.org.my or call Ms.Yong (012 5282082) / Kenny (05 2253581)

YES, PLEASE REGISTER ME!

Name:			
IC No:		FPAM No:	
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MODE OF PAYMENT

- By cash, please bank into Maybank A/C 5083 1921 2198 and email / fax in bank-in slip
- By cheque payable to FPAM Ipoh Chapter. (Cheque no.: _____ Amount: _____)

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