

It was like the light turned on in my head.

The scattered financial knowledge that I had gathered over the years crystallized during the Portfolio Management Course.

Karen Fitz Ritson presented the financial concepts in a clear, precise manner that took the class step by step to understanding how the financial markets work and the different asset types that make up the markets.

The Portfolio Management programme stressed a methodology of "looking behind the numbers".

This skill is integral to my job as a financial reporter. And of course, there are the networking opportunities. Individuals of all walks in the financial community came together as a family in the programme.

We like to consider ourselves Ritsonites.

DENNISE WILLIAMS
Staff Reporter
The Gleaner Company



COURSE OUTLINE

The History of Portfolio Management

- The principles of Harry Markowitz
- The principles of Sun Tzu and the Art of War

Types of Investment Instruments

Mutual Funds/ Unit Trusts

Fundamental Analysis

- Time value of money
- Analysis of financial ratios

Technical Analysis

The implementation of Asset Allocation techniques:

- The designing process
- The balancing of the asset classes
- The implementation process

The Capital Asset Pricing Model

- Strategy Development
- Implementation
- The Analytical Framework

Conclusion

- How to create the optimal portfolio
- Case Studies
- How to maximize the yields
- How to calculate the gains and track the returns on the investments



FITZ RITSON & ASSOCIATES
P.O. Box 488, Kingston 8. Tel: 756-1560

The cover of the Portfolio Management Programme brochure. At the top left is the logo for FITZ RITSON & ASSOCIATES, which includes a stylized torch. Below the logo, it says "PRESENTS THE" in small letters, followed by "Portfolio Management Programme" in large, bold, yellow letters. The background is a photograph of several people, including a woman in a blue blazer and glasses, and a man in a white shirt, who appear to be engaged in a discussion or presentation.

The Objective of Portfolio Management

The Portfolio Management Certificate programme is designed for the individual with the desire to comprehend the fundamentals of successfully creating and managing a portfolio. Ideally this course is best suited for individuals who have had previous exposure and training in finance, however the material is comprehensive enough for individuals who have never had previous exposure to the subject matter.

The track record of this course is the portability, which students can translate to their job functions and their own personal growth and development. To date in excess of 38% of the 400 students participated in this course have gained upward mobility in their respective organizations.

The JMMB Perspective

Diana Burgess
Cultural Development and Training Specialist



“This course brings a tremendous amount of organization and insight to the topics relevant to portfolio management. The feedback is very positive from our employees, and they have been able to translate aspects of the course material into “live” situations at the workplace”

This course is instructive for financial planners who create wealth for their clients and are able to enhance their skills in giving informed financial advice.

This course is also very thought provoking for the analysts, as it gives them the opportunity to upgrade their techniques in analyzing portfolio management for the millennium best business practices.



The Philosophy of Portfolio Management

The guiding principles of Markowitz, Sharpe and Graham are highlighted in this course. Their research and analysis over the past 40 years is the foundation for which many of these techniques are built upon today.

This course aims to reinforce the basic goals of Portfolio Management, and should be viewed as the “**bible**” in successfully managing a portfolio regardless of its size and the ability to do the following:

1. Value Maximization: how to allocate resources to maximize the return on investments.
2. Balance: how to achieve the appropriate balance, dependent on the level of risk that the portfolio is exposed to.
3. Strategic Direction: the portfolio should have a basic blueprint in order to strategize the investment.



The Fitz Ritson and Associates Philosophy

Training with relevancy for those with the desire to succeed.

This is the mantra and guiding principle of our programmes. The differentiation of the Portfolio Programme is the portability of the material and the ongoing research and techniques that are implemented. Students are equipped with best practices in portfolio management coupled with the thought provoking material and careful analysis that will immediately impact to the bottom line of any investment portfolio.



Our Guest Lecturers

The Portfolio Management Course is supported by a high caliber of guest speakers with proven track records in their respective industries, as they share their knowledge and experiences in their relevant areas of expertise.

Lecturers are supported from all areas of the financial industry in addition to CEOs of listed companies on the Jamaican Stock Exchange.



The Student's Opinion

Initially your only expectation is to learn much about the intricacies of financial theories and models. However, the experience at *Fitz, Ritson & Associates*, not only increases your knowledge base with a wealth of practical knowledge/information, but also provides inspiration and determination to realize your true potential”

Wendy Birthwright
Personal Banking Officer
Capital & Credit Merchant Bank.

Portfolio Management provides relevant information for financial service professionals who are driven by the desire to provide good financial advice to clients. The information and technical training, facilitates a good background for the provision of sound wealth creation and management advice to clients. I have personally benefited having applied the techniques to my own portfolio.

Jerome Smalling
Branch Manager
Bank Of Nova Scotia UWI Branch.

