

EVETT HINES

Senior Account Executive
- VM Wealth Management



I count myself as a distinguished Ritsonite having been blessed, on more than one occasion, to participate in the varying programmes offered by Karen and her esteemed team. My first introduction to excellence came with the Portfolio Management Programme in 2002 that sought to highlight the effectiveness, and potential rewards, of building a sound portfolio from the ground up. This programme was just a precursor of greater things to come, as with each encounter there was marked improvement in material and delivery format. The variety of programmes offered are geared toward not only equipping participants with the requisite knowledge to effect positive change in the Jamaican financial sector by the employment of critical thinking and analysis, but also to aide in the formulating of networks amongst industry players.

The recent accreditation by the University Council of Jamaica has only formalized what we Ritsonites have long known and personified, recognition of greatness through hard work.



COURSE OUTLINE

Introduction

An overview of the macro and micro economic environment and the philosophy of the programme.

Types of Investment Instruments

An examination of all investment instruments and their risk profile

Role of the Jamaica Stock Exchange

How the JSE operates and understanding their rules and implications

Role of the Financial Services Commission

Understanding the Financial Services Act and its implications to investment. Defining the role of the FSC.

Codes of Ethics and Professionalism

Understanding the need to follow strict codes of Ethics

Time Value of Money

Present value and future value calculations and their implications

Fundamental Analysis

Examination and interpretation of financial ratios supported by case studies

Jamaican Laws on Taxation and its Implications to efficient Portfolio Management

Technical Analysis

Tools and applications to forecast stock prices and movements

Capital Asset Pricing Model

Understanding the concept of risk and how it is applicable in the creation of a sound investment portfolio/fund

Asset Allocation

How to create the optimal portfolio evaluation and the risk profile of instruments



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FITZ RITSON & ASSOCIATES

presents

THE SECURITIES & PORTFOLIO MANAGEMENT PROGRAMME

Accredited by the UCI
Approved by the FSC

About the Securities and Portfolio Management Programme

The Securities and Portfolio Management Certificate Programme is the first accredited securities programme in the Caribbean region. It is designed for the individual who is desirous of being exposed to the financial, securities and regulatory industry in order to operate at a global level, to be competitive in the local regional and international market place. Coupled with the sound fundamentals of portfolio management to garner the technical skills and competence to cope in a dynamic environment. Also to understand the multi faceted investment instruments and their associated risk factors which affect their performance to build the optimal portfolio. One also has to understand investor psychology of investing which is a growing and complex science and how it impacts not only on the Portfolio's performance but also on the reputation of the financial practitioner if they do not fully understand technical competencies this entails to function in a global environment.



The reputation of programmes designed by Fitz Ritson and Associates is one of portability. Students are expected to be able to translate the course content into their respective job functions and/or their own personal growth and development. To date 63% of our students since inception who have participated in programmes delivered by Fitz Ritson and Associates have gained upward mobility in their respective organizations.

This Course is instructive for the investment/financial professional who is desirous of becoming advisors, traders, analysts, administrators (at all levels) and supportive roles in the financial industry

About Fitz Ritson and Associates

Fitz Ritson and Associates was incorporated June 2001. It is a professional training institute designed for the delivery of professional programmes focusing in the area of business administration and their related fields.

The Principals of this organization have a solid background in financial/business management, coupled with a combined 75 years of experience, thus the genesis of the flagship programme Portfolio Management - the standard by which all programmes are designed and delivered.

- 2005 Fitz Ritson and Associate Programmes were delivered online
- 2006 Fitz Ritson and Associates Programmes were Accredited by UCJ. The first accredited professional Programmes in the Caribbean region.
- 2008 The Securities and Portfolio Management Programmes - approved by the FSC. The first accredited Securities Course in the Caribbean region.

Students enjoy our interactive and participatory style of delivery which allows them to make relevance of their experiences. Students often say "Learning is Fun the **RITSONITE** Way!!!"

The Fitz Ritson and Associates' Philosophy

Training with relevance for those with the desire to succeed.



This is the mantra and guiding principle of Fitz Ritson and Associates. The distinction of The Security and Portfolio Management Programme is the portability of the material and the ongoing research and techniques that are implemented. Students are equipped with the best practices in the securities and the portfolio management industry, through thought provoking material coupled with sound analytical tools with the objective to strive for excellence and giltedge standards in the industry which will immediately impact the bottom line.



The Philosophy of The Securities and Portfolio Management Programme

This programme is designed to:

- * Hone the qualitative and quantitative fundamental skills integral for the design and the allocation of securities for a successful portfolio.
- * Understand and quantify the risk associated with the development of portfolios
- * Comprehend the mechanics of asset allocation in order to align the associated risks when creating the desired rate of return of the Portfolio
- * Understand the regulatory environment that they operate in
- * The importance of sound business ethics.



The Student's Opinion of Fitz Ritson and Associates' Courses:

GRAHAM A. JERVIS

Hydro Informatics Engineer
Smith Warner International



The Portfolio Management Programme for me was very informative and interactive. I found it very enjoyable! As an engineer with no prior business background, to be able to break down the fundamentals of the course content, translate this knowledge into analyzing financial statements and making informed investment decisions in creating my own personal portfolio is quite an achievement!

NICOLE BRAHAM

Relationship Officer
Bank of Nova Scotia New Kingston



I found the whole course to be very encouraging. The support from students and the lecturers was top notch. I felt empowered by all by fellow classmates and my lecturers. Fitz Ritson and Associates truly has what it takes to create an environment conducive to learning. KUDOS!!!!