

## Structured investment products: how do they work, and what is their added value?

### GOALS

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Structured investment products have entered many retail investor portfolios. It is therefore important to have a good understanding of how structured investments work. The course aims to contribute to a better knowledge of these popular investment products. Particular attention is paid to recent legislative initiatives on transparency and investor protection.

This course aims to:

- understand the essence of structured investment products in terms of valuation, hedging, internal risk management;
- view structured products from a investor's perspective, from the distributor's or issuer's point of view and in a portfolio context;
- frame the various (new) regulatory concepts around structured products and assess their relevance at the product manufacturing as well as at the point-of-sale.

### SUMMARY

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#### Category:

- Risk, finance & treasury
- Compliance & audit

#### Difficulty level:

Advanced

#### Certification type:

In class training

#### Price:

- Member: € 550.00
- Non member: € 650.00
- Partner BZB: € 550.00
- Incompany: custom tailored, prices on demand

#### Points/hours:

- Bank: 6
- Compliance: 6

#### Accreditations:

- 600.013 permanent education banking
- / permanent education compliance

### INTENDED AUDIENCE

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This training course can be followed by multiple target groups:

- compliance and legal officers;
- risk officers;
- team members dealing with retail product information & development;
- product developers;
- portfolio managers and investment advisers;
- ...

## FOREKNOWLEDGE

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**Advanced level training:** this training requires a general basic knowledge of the subject.

## CONTENT

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#### Part I:

- Where do structured investment products figure in the "savings and investment" landscape?
- How are structured investment products composed?
- How is the value of structured investment products determined?

#### Part II:

- How can we distinguish the different pay-offs of structured investment products? Explanation using recent examples from various Belgian distributors and issuers.
- Recent regulatory evolutions (MiFID2, PRIIPS in its national implementation, Royal Marketing Decree), explained with the knowledge from this training and on the basis of examples.

## PRACTICAL INFORMATION

- **Duration:** 1 day of training (6 class hours)
- **Hours:** 09:00 to 17:00
- **Location:** Febelfin Academy: Phoenix building, Koning Albert II-laan/Boulevard du Roi Albert II 19, 1210 Brussels
- **Language:** This training will be given in English

## METHODOLOGY

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You follow a **‘Classroom training’** face-to-face in a group. You, the other participants and the teacher are all present in the same classroom at an agreed time. There is an opportunity for interaction and feedback, both from the participants to the teacher and vice versa. The teaching material consists as a basis of a presentation via the MyFA learning platform, supplemented with various other items (such as digital syllabus, presentation, audiovisual fragments, etc.).

#### Training material:

- PowerPoint presentation