MAWA EVENTS

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GLOBAL MARKET SOLUTIONS TAILORED TO CLIENT NEEDS

"Designing and Delivering Customized Financial Solutions for Institutional and Corporate Clients"

Schedule

Venue (InHouse)	Fees
At Your Organization Premises	Ask For The Quotation

► **Available delivery methods:** In-House Training

Introduction

This advanced 5-day course provides a deep dive into how banks and financial institutions develop and offer tailored global market products—ranging from FX and rates to commodities and structured solutions—aligned with the specific needs of their clients. Participants will explore client segmentation, solution structuring, risk management, cross-asset knowledge, and relationship strategies that underpin successful deal origination and execution.

Objectives

By the end of this course, participants will be able to:

- Understand core global markets instruments: FX, rates, derivatives, and structured products
- Map product offerings to client types and needs (corporate, FI, HNW, public sector)
- Design tailored hedging and investment solutions
- Align product delivery with compliance, risk appetite, and market trends
- Collaborate effectively across sales, structuring, trading, and risk teams

Why Attend

- Gain practical exposure to real-world structuring and client solution strategies
- Strengthen your ability to translate market dynamics into client-centric ideas
- Enhance collaboration between sales, structuring, and trading desks
- Understand cross-asset product applications in diverse industries
- Build trust and long-term value in client relationships through bespoke solutions

Target Audience

- Treasury & markets professionals
- Corporate and institutional relationship managers
- Investment and structured product sales staff
- Client solutions and product structuring teams
- Risk managers supporting market solutions

Individual Benefits

- Deep understanding of asset classes and solution structuring
- Better positioning and explanation of tailored products
- Confidence in dealing with C-level clients
- Enhanced consultative selling and pitching abilities

Organizational Benefits

- Increased client retention and revenue from bespoke products
- Stronger cross-sell and solution delivery teams
- Improved risk awareness and compliance alignment
- Competitive edge in corporate and institutional coverage

Instructional Methodology

- Concept Briefings: Expert-led sessions explaining complex instruments, structuring logic, and client needs. Use of visual aids, real-life deal examples, and current market insights.
- Case Studies: Analysis of successful and failed market solutions. Focus on client objectives, structuring choices, execution challenges, and regulatory context.
- Workshops and Simulations: Scenario-based exercises to design solutions for specific client profiles. Trading simulations, pitch-building, and live team presentations with peer feedback.Group Discussions Peer learning through guided discussions on cross-functional challenges. Sharing of institutional practices across sales, structuring, and trading roles.
- Tools & Templates: Fund screening models, pricing sheets, product pitch templates. Risk-return comparison matrices and client mapping guides.
- Real-Time Feedback: Continuous instructor and peer evaluation during role plays and workshops. Final simulation with panel feedback to assess readiness and presentation skills.

Course Outline

DETAILED 5-DAY COURSE OUTLINE (Customizable) Training Hours: 07:30 AM – 03:30 PM Daily Format: 3–4 Modules | Coffee breaks: 09:30 & 11:15 | Lunch Buffet: 01:00 – 02:00

Day 1: Foundations of Global Markets & Client Coverage

- Module 1: Overview of Global Markets Products
- FX, interest rates, commodities, credit
- Derivatives, cash, and structured solutions
- Module 2: Understanding Client Segments
- Corporate vs. FI vs. government vs. HNW clients
- Client business models and financial pain points
- Module 3: Role of Sales, Structuring, and Trading
- How solution teams collaborate
- Client lifecycle: pre-trade to post-trade

Day 2: FX & Rates Products for Client Solutions

- Module 4: FX Spot, Forwards, and Swaps
- Pricing, risks, and applications
- FX risk in international operations
- Module 5: Interest Rate Risk & Hedging Tools
- Swaps, options, and futures
- Yield curve strategies and liability management
- Module 6: Case Study – Hedging a Multinational's FX & Rate Exposure
- Simulated client meeting and solution pitch

Day 3: Derivatives, Structured Products & Customization

- Module 7: Introduction to Structured Products
- Capital protection, yield enhancement, and leverage
- Module 8: Tailoring Solutions – Key Drivers
- Client constraints: liquidity, accounting, risk appetite
- Module 9: Cross-Asset Strategies & Innovation
- Multi-asset structures, hybrids, barrier options
- Pitching structured solutions to different clients

Day 4: Risk, Compliance & Execution Excellence

- Module 10: Market Risk, Credit Risk, and P&L Impact
- Trade life cycle and risk ownership
- Valuation and mark-to-market concepts
- Module 11: Regulatory & Conduct Considerations
- Suitability, KYC, MiFID II, local rules
- Best execution and documentation practices
- Module 12: Case Study – Full Deal Structuring and Compliance Review
- Build and defend a structured FX/rates solution

Day 5: Real-Time Simulation & Capstone Exercise

- Module 13: Designing a Custom Client Solution (Workshop)
- Client profile analysis
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Matching market view with product design

- Module 14: Live Role Play: Client Pitch & Objection Handling
- Team presentation to a simulated client panel
- Feedback on structuring and presentation
- Module 15: Final Wrap-Up & Action Planning
- Course review and certification
- Personal development strategy and takeaway tools

Certification

Certification: Participants will receive a Certificate of Completion recognizing advanced competency in global market solutions and client-tailored structuring.

Why Choose MAWA Events

- **Global Expertise:** More than 17 years of experience in professional training and consulting.
- **Industry-Leading Faculty:** Courses delivered by seasoned professionals with hands-on experience.
- **Practical Insights:** Learn to turn theory into actionable strategies for real-world business impact.
- **Client-Focused Solutions:** Customized programs designed to achieve your organisation’s unique goals.

In-House / Customized Training Interested in running this course for your team? Please contact us:	TEL: **+601116373203**	EMAIL: **info@mawaevents.net**