MAWA EVENTS

Address: No. 857, Block A2. Leisure Commerce Square - No 9., 46150 Petaling Jaya, Selangor, Malaysia

Phone: +601116373203 | **Email:** info@mawaevents.net

UNDERSTANDING MUTUAL FUNDS, ETFS, AND REITS FOR INVESTORS

"Diversify Smartly – Decode the Essentials of Modern Investment Vehicles"

Schedule

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

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

Introduction

The modern investment landscape offers individual and institutional investors a wide range of pooled investment vehicles, including mutual funds, exchange-traded funds (ETFs), and real estate investment trusts (REITs). This course provides a practical, clear understanding of how these vehicles operate, their benefits and risks, fee structures, regulatory framework, and their role in diversified portfolios. Through real-world examples, comparisons, and performance analysis, participants will gain the tools needed to make informed investment decisions and optimize portfolio strategies.

Objectives

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

- Understand the structure, operations, and classifications of mutual funds, ETFs, and REITs
- Analyze performance metrics and compare fund types
- Evaluate fee structures, tax considerations, and liquidity
- Assess the role of these vehicles in asset allocation and diversification
- Identify risks associated with fund investing and how to mitigate them

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Why Attend

- Learn to make smarter investment choices across fund types
- Gain confidence in interpreting fund reports, NAVs, and return data
- Understand how to use funds to target growth, income, or inflation protection
- Know how to evaluate fund managers, strategies, and underlying assets
- Equip yourself to advise clients or manage personal investment portfolios

Target Audience

- Individual Investors and Family Offices
- Financial Advisors and Wealth Managers
- Pension Fund and Insurance Investment Staff
- Junior Analysts and Fund Operations Professionals
- Corporate Treasury & Investor Relations Teams

Individual Benefits

- Demystify complex fund structures and industry jargon
- Learn key metrics like expense ratio, tracking error, yield, and beta
- Gain hands-on confidence to assess and compare funds
- Understand the real estate sector’s exposure via REITs

Organizational Benefits

- Equip staff to better guide investors or clients
- Improve portfolio construction with diversified, cost-efficient vehicles
- Reduce regulatory risk through informed product selection
- Enhance internal investment communication and risk control

Instructional Methodology

- Instructor-led modules with real fund documentation
- Peer discussions and guided comparative analysis
- Portfolio simulations using live fund data
- Case studies on fund failures and success stories
- Visual aids and simplified walkthroughs of prospectuses and fact sheets

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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 Pooled Investment Vehicles

- Module 1 (07:30 – 09:30): Introduction to Mutual Funds, ETFs, and REITs
- Module 2 (09:45 – 11:15): How Funds Are Structured and Operated
- Module 3 (11:30 – 01:00): Roles of Fund Managers, Custodians, and Distributors

Day 2: Mutual Funds in Depth

- Module 4 (07:30 – 09:30): Types of Mutual Funds – Equity, Debt, Balanced, Thematic
- Module 5 (09:45 – 11:15): NAV, Returns, and Performance Reporting
- Module 6 (11:30 – 01:00): Costs: Load, Expense Ratios, and Hidden Charges

Day 3: ETFs – Flexibility and Real-Time Investment Tools

- Module 7 (07:30 – 09:30): ETF Mechanics – Index Tracking, Market Trading, Creation/Redemption
- Module 8 (09:45 – 11:15): ETFs vs Mutual Funds – Pros, Cons, and Strategic Uses
- Module 9 (11:30 – 01:00): Evaluating ETF Liquidity, Tracking Error, and Bid-Ask Spread

Day 4: Real Estate Investment Trusts (REITs)

- Module 10 (07:30 – 09:30): What Are REITs? Structure and Income Strategy
- Module 11 (09:45 – 11:15): Public vs Private REITs, Tax and Yield Considerations
- Module 12 (11:30 – 01:00): REIT Risks, Property Sector Focus, and Real-World Examples

Day 5: Comparison, Analysis & Portfolio Integration

- Module 13 (07:30 – 09:30): Comparing Mutual Funds, ETFs, and REITs
- Module 14 (09:45 – 11:15): Using Funds and REITs for Strategic Asset Allocation
- Module 15 (11:30 – 01:00): Final Simulation – Build a Diversified Investor Portfolio + Certification

Certification

Participants will receive a Certificate of Completion titled: “Understanding Mutual Funds, ETFs, and REITs for Investors”, affirming their grasp of pooled investment vehicles and portfolio strategies.

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**

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