

# 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

## 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

## 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

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### In-House / Customized Training

Interested in running this course for your team?

Please contact us:

TEL:

**+601116373203**

EMAIL:

**info@mawaevents.net**