



Global Financial Markets and Asset Classes Training Course

7 – 11 June 2027
San Diego



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Ref: 443_135768 **Date:** 7 – 11 June 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Global Financial Markets and Asset Classes Training Course is a five-day foundation course for banking, investment, treasury, finance, and risk professionals, who leave with a Financial Markets and Asset Class Decision File. The course maps market structure and compares equities, fixed income, money-market instruments, currencies, commodities, real estate, and alternative assets through risk-return, diversification, valuation, and portfolio-decision tools. Agile Leaders Training Center provides foundation training in global financial markets and asset classes.

Who Should Attend

- Investment functions responsible for comparing securities and asset classes
- Banking functions responsible for market products and client solutions
- Treasury functions responsible for liquidity and market exposure
- Finance functions responsible for valuation and investment records
- Risk functions responsible for investment and portfolio exposure
- Advisory functions responsible for explaining investment choices

The course assumes participants already handle financial, market, client, or investment information and leaves out advanced security analysis, complex derivatives valuation, and active trading strategies.

Departments and Industries

The course supports departments that analyze markets, compare assets, assess risk, value investments, or contribute to portfolio decisions across financial and institutional settings.

- Banks, investment firms, and brokerage operations
- Asset managers, pension functions, and family offices
- Corporate treasury and finance departments
- Insurance and institutional investment functions
- Real estate, infrastructure, and commodity investment teams
- Risk, audit, and financial advisory functions

Learning Objectives

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



- Apply a global financial-market structure map
- Compare major financial and real asset classes
- Use risk-return and basic valuation measures
- Analyze market indicators and investment drivers
- Evaluate diversification and introductory portfolio choices
- Build a Financial Markets and Asset Class Decision File

Course Agenda

Day 1: Financial Market Structure

- Capital Allocation and Market Function Map
- Primary and Secondary Market Flow Diagram
- Issuer, Investor, and Intermediary Role Matrix
- Market Liquidity and Price Discovery Checklist
- Global Financial Market Indicator Dashboard

Day 2: Equities and Fixed Income

- Equity Ownership and Return Component Sheet
- Equity Valuation Multiple Comparison
- Bond Cash-Flow and Yield Timeline
- Interest-Rate and Credit Risk Matrix
- Equity and Fixed-Income Attribute Scorecard

Day 3: Money Markets, Currencies, and Commodities

- Money-Market Instrument Comparison Table
- Currency Return and Exposure Record
- Commodity Spot and Futures Structure Map
- Inflation and Interest-Rate Driver Grid
- Liquidity, Volatility, and Market-Risk Profile

Day 4: Real Assets, Alternatives, and Portfolios

- Real Estate Income and Valuation Sheet
- Private Equity and Infrastructure Feature Matrix
- Hedge Fund Strategy Classification Guide
- Risk-Return and Correlation Comparison
- Asset Allocation and Diversification Worksheet

Day 5: Investment Decision Practice

- Exercise: Market Structure and Indicator Review
- Exercise: Equity and Bond Comparison
- Exercise: Currency, Commodity, and Real-Asset Analysis
- Exercise: Diversification and Allocation Decision
- Capstone Exercise: Financial Markets and Asset Class Decision File

Practical Exercises

The course includes the following suggested activities:

- Suggested activity: map issuers, investors, intermediaries, instruments, primary issuance, and secondary trading across financial markets.
- Suggested activity: compare equity and bond cash flows, valuation inputs, risks, liquidity, and expected return components.
- Suggested activity: profile money-market, currency, commodity, real-estate, and alternative exposures using a common attribute matrix.
- Suggested activity: assemble market indicators, asset comparisons, risk-return measures, correlations, and allocation choices into one decision file.

FAQs

Who suits global financial markets and asset classes training, and what does it assume?

Global financial markets and asset classes training suits banking, investment, treasury, finance, risk, advisory, and institutional functions and assumes workplace exposure to financial, market, client, or investment information.

How does financial markets and asset classes training differ from advanced security analysis?

Financial markets and asset classes training builds cross-market comparison and introductory decision skills, while advanced security analysis examines individual issuers, securities, forecasts, and valuation models in greater depth.

What is the difference between primary and secondary financial markets?

Primary markets channel capital through newly issued securities, while secondary markets allow existing securities to trade between investors and support liquidity and price discovery.



Why compare risk and return across asset classes?

Risk-return comparison helps participants evaluate how potential reward, uncertainty, liquidity, income, price sensitivity, and investment horizon differ across available assets.

How does diversification support investment portfolios?

Diversification combines assets with different return drivers and correlations so that one exposure does not dominate the portfolio's overall behavior.

Conclusion

Participants take back a Financial Markets and Asset Class Decision File containing market maps, asset scorecards, valuation sheets, risk-return measures, indicator dashboards, correlation comparisons, and allocation choices. The file connects market context with consistent asset comparison. It gives teams a working basis for discussing investments, documenting assumptions, and supporting introductory portfolio decisions.