

Investment Platform > Research Analysis

Title	Provide investment recommendations to different types of clients
Code	106798L6
Range	Providing recommendations on investment ideas. This applies to recommendations on different kinds of investment products and to different characteristic of clients across regions.
Level	6
Credit	5 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Demonstrate specialized research knowledge in investment analysis <p>Be able to:</p> <ul style="list-style-type: none"> • Demonstrate specialized knowledge in financial markets, financial modelling and different asset classes in order to analyze the future development trends • Conduct research on the economy and financial markets at local, regional and global levels in order to formulate investment recommendations 2. Develop recommendations on portfolio choices <p>Be able to:</p> <ul style="list-style-type: none"> • Consolidate research findings regarding projections on future economic / market outlook and evaluate implications on different investments • Anticipate the risk and returns of different investments by employing suitable models / programmes • Conduct performance benchmark to evaluate the potential of different investment ideas • Develop actionable investment ideas for different investments, e.g. timing for buying / selling 3. Evaluate the profiles of different groups of clients <p>Be able to:</p> <ul style="list-style-type: none"> • Evaluate the profiles (e.g. investment experience, investment style, time horizon, risk appetite) of different investors to assess their risk bearing ability in the context of portfolio management • Customize investment advice (e.g. asset allocation, stock selection) to different groups of customers and ensure suitability of the advice
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Provision of investment recommendations. This should be based on analysis on researches on economic / market development, performance of different assets and anticipated risks, etc.
Remark	