

Specification of Competency Standards
for the Retail Industry
Unit of Competency

Functional Area - Financial Management

Title	Monitor financial investment management
Code	107257L4
Description	For financial revenue and expenditure procedures, monitor the allocation of resources in various sectors of the corporate.
Level	4
Credit	6 (For Reference Only)
Competency	<p>Performance Requirements</p> <p>1. Understand the contents of financial investment management</p> <ul style="list-style-type: none"> • Understand the definition of investment • Identify the types of different investments, for example: <ul style="list-style-type: none"> ○ Direct investment ○ Indirect investment ○ Long-term investment • Short-term investments • Monitor the source of corporate funds, for example: <ul style="list-style-type: none"> ○ Benefit funds ○ Borrow money <p>2. Apply financial investment monitoring skills</p> <ul style="list-style-type: none"> • Review the current financial management problems • Arrange financial revenue and expenditure so that corporate to maintain payment and solvency • Calculate individual project budgets • Raise the required funds for corporate development with lower capital costs and smaller financing risks • Strengthen risk management awareness <p>3. Exhibit professionalism</p> <ul style="list-style-type: none"> • With professional attitude to monitor the financial investment management and protect the overall interests of corporate.
Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> • Master the specific content of financial management. • Analyze the current financial management problems and propose optimization solution.
Remark	