



# Dynamique

2016 series



Creative Content for Contemporary CPD on-line

“Think the impossible, deliver the exceptional”

Auckland, Hong Kong, London, Singapore, Wellington



“Think the impossible, deliver the exceptional”

As the year progresses so new opportunities and risks emerge. The Dynamique range of incisive CPD sessions are designed to help firms deliver better performing products and a seamless client service experience. As highly effective risk management is essential for the survival of any investment advisory firm, private bank or wealth manager, we work as a team to ensure that risks remain captured then contained and future proofed as much as possible.

Businesses must continue to evolve or they will die. This evolving journey creates unexpected risks. CEOs, CFOs, and CIOs can no longer be oblivious or remain unaccountable for risks building up below decks. Regulators take the view that whoever is on the bridge at the time of a firm “risk event” remains totally responsible.

How we can help you perform better? Business performance excellence is not just about one aspect of the business. To be effective you have to take a holistic view of the enterprise, why clients should buy your products, essential in-house or out-sourced client services to support product delivery, industry sector pressures, rapidly evolving regulation and how your firm is performing relative to your peers.



“Think the impossible, deliver the exceptional”

These technical workshops continue to appeal to wealth management firm stakeholders, regulators, trustees, professional investors, investment banks, global custodian banks, investment consultants, lawyers, and fund managers.

We also offer clients specialised bespoke workshops designed around their own unique business model. This makes the workshop extremely focused and of high added value for all client nominated attendees. Please contact us for a workshop agendas, pricing, timing and location.



# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems

Product: Introduction to Asset Management (AM1 Rel.v1)

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
M1 Business and process of contemporary investment firm M2 Strategy setting M3 Relationship management M4 Risk management M5 Tax impact on investment returns M6 Asset allocation M7 Best execution M8 Institutional investment M9 Collective investment vehicles M10 Alternative assets M11 Performance measurement M12 Corporate governance M13 Responsible investing M14 Global investment performance standards M15 Relative valuation M16 Investment styles M17 Forward looking valuation models	<ul style="list-style-type: none"> <li>• Content loaded directly into clients' proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 8 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique's Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: AM1 CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 17 modules</li> <li>❖ 88 e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> </ul>
<i>Exploded module information available upon request</i>	<i>Free appropriate and suitability assessment</i>



# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems

Product: Asset Management 2 (AM2 Rel.v1)

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 Investment process in the new world order            M2 Strategic Asset Allocation            M3 Institutional Funds            M4 Dealing and trading optimisation            M5 Portfolio trading key decision points            M6 Risk budgeting            M7 Corporate governance – what is now expected            M8 Contemporary alpha adding investment strategies            M9 Winning mandates and warning bells            M10 Private equity            M11 Property investment            M12 Structured Credit Assets</p>	<ul style="list-style-type: none"> <li>• Content loaded directly into clients’ proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 6 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique’s Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: AM2 CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 12 modules</li> <li>❖ 70 e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> <li>❖ Jargon buster</li> </ul>
<p><i>Exploded module information available upon request</i></p>	<p><i>Free appropriate and suitability assessment</i></p>



# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems  
Product: Asset Servicing (AS Rel.v1)

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 Speeding up rights issue availability of capital M2 Corporate events M3 Characteristics of a corporate event and broadcasting the news M4 How income benefits are collected M5 Choosing the best route to market M6 Initial Public Offerings, Mergers and Acquisitions key processes M7 Corporate events performance issues M8 Rights Issues</p>	<ul style="list-style-type: none"><li>• Content loaded directly into clients' proprietary system in pdf format.</li><li>• Content delivered to client nominated third party agent e-learning platform</li><li>• Includes multiple choice assessment quiz</li><li>• CPD qualifies for up to 3 structured hours</li></ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique's Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: AM2 CPD consists of:</p> <ul style="list-style-type: none"><li>❖ 8 modules</li><li>❖ 38 e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li><li>❖ Assessment questions multiple choice each with 4 options</li><li>❖ Jargon buster</li></ul>
<p><i>Exploded module information available upon request</i></p>	<p><i>Free appropriate and suitability assessment</i></p>



# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems  
 Product: Collective Investments/Managed Funds (CIMF Rel.v1)

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
M1 Risk diversification M2 Types of funds M3 Passive and synthetic funds M4 Investment styles M5 Fund pricing, costs and reporting M6 Client risk appetite M7 Loads, supermarkets and prospecti M8 Performance maths M9 Compliance and regulation M10 Trustees, fiduciaries, arbitration and compensation M11 Tax wrappers ISA, PIEs and KiwiSaver	<ul style="list-style-type: none"> <li>• Content loaded directly into clients' proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 3 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique's Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: CIMF CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 11modules</li> <li>❖ 33 e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> <li>❖ Jargon buster</li> </ul>
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# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems

Product: Client Service Excellence (CSE Rel.v1)

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 Service excellence and profitability  M2 Strong client relationships and service expectation  M3 How client enquiry tracking improves service  M4 Choosing the most effective client media for communication  M5 Call centres - adding or eroding the customer experience  M6 Building the optimum structure for client services  M7 Telephone network management  M8 Getting the best from meetings  M9 Sources of client feedback to improve services  M10 Client relationships need continual work  M11 Satisfied clients equals good profits  M12 Clients and the internet – tectonic shift in client power  M13 Achieving service excellence  M14 Innovation – how good is your organisation?  M15 Learn from leading companies  M16 Client relationship management  M17 Corporate branding  M18 When your service proposition lets your clients down  M19 Building, sharing and being realistic about corporate visions  M20 Client profitability and relationship marketing  M21 The winning sales pitch and the WOW factor  M22 Departure of a star performer  M23 Names changes do they work?  M24 Deriving service benefits from angry clients  M25 Service and strategy in challenging business cycles  M26 Anti-Money Laundering: know your client pre-transaction</p>	<ul style="list-style-type: none"> <li>• Content loaded directly into clients’ proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 6 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique’s Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: CSE CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 26 modules</li> <li>❖ 55 e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Unique customised quiz designed with client</li> </ul>
<p><i>Exploded module information available upon request</i></p>	<p><i>Free appropriate and suitability assessment</i></p>





# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems  
 Product: Corporate Evaluation (CE Rel.v1)

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
M1 Challenging the conventional models M2 Risk, cash flow and strategic translation M3 Identifying shareholder value in a company M4 Dividend discount models M5 Identifying drivers of value in cyclical companies M6 Earnings, fade, betas and ratios M7 Investing in emerging markets M8 Valuing e-commerce companies M9 Looking at the value of real options embedded in a firm M10 Mergers and acquisitions M11 Using forward looking investment models within a firm to enhance shareholder value	<ul style="list-style-type: none"> <li>• Content loaded directly into clients' proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 6 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique's Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: CE CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 11 modules</li> <li>❖ 57 e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> <li>❖ Jargon buster</li> </ul>
<p><i>Exploded module information available upon request</i></p>	<p><i>Free appropriate and suitability assessment</i></p>



# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems  
**Product: Derivatives/Synthetics (DER Rel.v1)**

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 Evolution of derivatives – historical review to date            M2 Trading regulation clearing and custody            M3 Financial futures, Bond, Currency, and Equity Index            M4 Options            M5 Comparing and contrasting leading global exchanges with local market            M6 How professional investors use derivatives            M7 Risk Management            M8 Regulation and compliance</p>	<ul style="list-style-type: none"> <li>• Content loaded directly into clients' proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 3 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique's Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: DER CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 8 modules</li> <li>❖ 27 e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> <li>❖ Jargon buster</li> </ul>
<p><i>Exploded module information available upon request</i></p>	<p><i>Free appropriate and suitability assessment</i></p>



# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems

Product: Fixed Income (FI)

*WIP under conversion from Masterclass to CPD on-line*

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 Key features and conventions  M2 Bond market convention  M3 Review of fixed income maths  M4 Fixed rate bonds  M5 Floating rate bonds  M6 Zero coupon pricing methodology  M7 Zero coupon yield curve construction  M8 Bond yield curves  M9 Alternative measures of return  M10 Bond price sensitivity  M11 Managing portfolio risk  M12 Convexity  M13 Bond portfolio management tools  M14 Holding period yield immunisation  M15 Bond trading and portfolio management  M16 Foreign denominated bonds  M17 Option embedded bonds  M18 Spot forward interest rate relationship  M19 Interest rate swaps  M20 Fixed interest futures market  M21 VaR for bond portfolios  M22 Interest rate options  M23 Caps, collars and floors  M24 Financially engineered structured products</p>	<ul style="list-style-type: none"> <li>• Content loaded directly into clients' proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 3 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique's Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: FI CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 24 modules</li> <li>❖ TBC e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> <li>❖ Jargon buster</li> </ul>
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# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems

Product: Global Investor Services/Global Custody (GIS Rel.v1)

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 Client service proposition            M2 Financial instruments            M3 Security identifiers            M4 Modern portfolio theory (diversification and GIS)            M5 Network management            M6 Currency management            M7 Streamlining the settlement process            M8 Participants in the GIS value chain            M9 Client service hub and industry profile            M10 Sub-custodian performance            M11 Winning business – RFPs and consultants            M12 Intelligent order routing systems            M13 Actual or contractual settlement            M14 Country identification codes and ICSDs            M15 Protecting your clients’ interests corporate events            M16 International corporate governance            M17 Cash management            M18 Withholding tax process and qualifier            M19 Equity finance – securities lending and borrowing            M20 Master Trusts and multiple relationships            M21 Performance and Risk Management using KPIs            M22 Credit and operational risk            M23 Messaging systems and client services delivery            M24 Pricing and costing of services            M25 Outsourcing middle and back office services            M26 Market coverage : developed, emerging and frontier</p>	<ul style="list-style-type: none"> <li>• Content loaded directly into clients’ proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 3 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique’s Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: GIS CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 26 modules</li> <li>❖ 101 e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> <li>❖ Jargon buster</li> </ul>
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# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems  
Product: Global Share Trading (GST Rel.v1)

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 Principles of trade settlement M2 Trade capture M3 Trade enrichment M4 Trade validation M5 Pre-matching M6 Reporting to regulator M7 Trade instructions M8 Trade failure and risk M9 Mitigating counterparty risk M10 Global share trading across 48 main markets</p>	<ul style="list-style-type: none"><li>• Content loaded directly into clients' proprietary system in pdf format.</li><li>• Content delivered to client nominated third party agent e-learning platform</li><li>• Includes multiple choice assessment quiz</li><li>• CPD qualifies for up to 3 structured hours</li></ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique's Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: GST CPD consists of:</p> <ul style="list-style-type: none"><li>❖ 10 modules</li><li>❖ 33 e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li><li>❖ 48 local market e-bites</li><li>❖ Assessment questions multiple choice each with 4 options</li><li>❖ Jargon buster</li></ul>
<p><i>Explored module information available upon request</i></p>	<p><i>Free appropriate and suitability assessment</i></p>



# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems  
**Product: Equity Finance International Securities Lending (EFISL Rel.v1)**

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 Markets and structures            M2 Securities lending across 27 main global markets            M3 Security identifiers            M4 Modern portfolio theory (diversification and GIS)            M5 Network management            M6 Currency management            M7 Streamlining the settlement process            M8 Participants in the GIS value chain            M9 Client service hub and industry profile            M10 Sub-custodian performance            M11 Winning business – RFPs and consultants            M12 Intelligent order routing systems            M13 Actual or contractual settlement</p>	<ul style="list-style-type: none"> <li>• Content loaded directly into clients’ proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 3 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique’s Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: EFISL CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 13 modules</li> <li>❖ 19 e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> <li>❖ Jargon buster</li> </ul>
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# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems

Product: Alternative Strategies: Hedge Funds (ASHF Rel.v1)

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 Business model M2 Strategies and sub-sectors M3 Hedge elite M4 Exposure, gearing and asset pricing M5 Alpha, Sharpe and performance results M6 Business economics, listing and regulation M7 Fund of hedge funds M8 Quantitative investing M9 Prime broker and hedge fund relationship M10 Pre-asset allocation due diligence M11 Managing a portfolio of hedge funds M12 Regulation and infrastructure M13 Distorting performance result risk M14 Hedge fund institutional mandates awards</p>	<ul style="list-style-type: none"><li>• Content loaded directly into clients' proprietary system in pdf format.</li><li>• Content delivered to client nominated third party agent e-learning platform</li><li>• Includes multiple choice assessment quiz</li><li>• CPD qualifies for up to 5 structured hours</li></ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique's Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: ASHF CPD consists of:</p> <ul style="list-style-type: none"><li>❖ 14 modules</li><li>❖ 65 e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li><li>❖ Assessment questions multiple choice each with 4 options</li><li>❖ Jargon buster</li></ul>
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# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems  
**Product: Performance Measurement and Attribution Analysis (PMAA Rel.v1)**

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 How good is our Investment Process?            M2 Sources of Investment Out-Performance            M3 Source Contribution            M4 Global Investment Performance Standards            M5 Risk Management Models            M6 Global Indices, GICS, Free Float            M7 Pension Fund Performance Standards            M8 Performance Universes            M9 Derivatives in Investment Reporting            M10 Trading Cost Transparency</p>	<ul style="list-style-type: none"> <li>• Content loaded directly into clients' proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 5 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique's Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: PMAA CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 10 modules</li> <li>❖ 38 e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> <li>❖ Jargon buster</li> </ul>
<p><i>Exploded module information available upon request</i></p>	<p><i>Free appropriate and suitability assessment</i></p>





# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems  
 Product: Institutional /Wholesale Transition Management (IWTM Rel.v1)

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
M1 Transition Excellence M2 Pre-Hedging M3 Operating Models M4 Key Service components M5 Selecting the Transition Manager M6 The T- Charter M7 Mitigating Trading Costs M8 Delivering on Plan M9 Implementation shortfall M10 Complex Transitions M11 Learning from Experience-transition case study	<ul style="list-style-type: none"> <li>• Content loaded directly into clients' proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 5 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique's Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: IWTM CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 11 modules</li> <li>❖ 11 e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> <li>❖ Jargon buster</li> </ul>
<i>Exploded module information available upon request</i>	<i>Free appropriate and suitability assessment</i>



# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems

Product: Exchange Traded Funds (ETF)

*WIP under conversion from Masterclass to CPD on-line*

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 Drivers behind the rise of ETFs            M2 The global ETF ride time-line            M3 Ten ETF product myth breakers to help investors make fully informed non-emotional decisions            M4 The exchange traded product family and main asset classes            M5 How ETFs are used by institutional and retail investors            M6 Wealth management investor benefits            M7 Main global market players and market positioning            M8 Operational risk "Getting under the ETF bonnet"            M9 What to look for when choosing an ETF            M10 Trading exchange traded funds            M11 ETF risk management            M12 New markets product launches and investor product sentiment            M13 Next generation smart beta products            M14 Top 16 wish list for ETF product development            M15 Information, clarity and disclosures</p>	<ul style="list-style-type: none"> <li>• Content loaded directly into clients' proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 5 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique's Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: ETF CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 15 modules</li> <li>❖ TBC e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> </ul> <p>Jargon buster</p>
<p><i>Exploded module information available upon request</i></p>	<p><i>Free appropriate and suitability assessment</i></p>



# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems

Product: Wealth Management Non-Investment Risk (WMNI)

*WIP under conversion from Masterclass to CPD on-line*

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 Industry complacency is not an option            M2 Articulating to employees and clients how firm's business model works and benefits clients            M3 The "not-so-obvious" often overlooked: "how could this have happened to us?"            M4 Your client will ask you "how safe are my assets with your firm?"            M5 Red flagging risk hot spots in the investment process from manager's decision/settlement/custody            M6 Decline in gender balance, an antidote to hubris            M7 Resource risk: over extended managers running too many portfolios            M8 Knowledge bias risk to fund performance: not "looking over the fence": irrelevant qualifications            M9 Skillset risk: inadequate internal and external continuous training for incumbents and newbies            M10 Information becomes misinformation resulting in mis-selling on complex products            M11 Ignorance is no excuse for not delivering all round best practice" choose the right benchmark"            M12 Naive reliance on technology, "Do you understand how that algorithm should work?"            M13 Non-existent, incomplete, out of date workflow "swim-lane" diagrams.            M14 "It's in the portfolio why can't I trade it?" Reconciliation gaps create a false sense of security            M15 Wealth management is a complex business: your legal counsel may not understand            M16 Poor planning, slow response times due to changes in firm and increasing regulation            M17 Amalgamated assignments: the improper segregation of duties and parameters of responsibility            M18 Governance risk events that impacted fund performance; LIBOR, forex market rigging could it have been prevented and others as appropriate...</p>	<ul style="list-style-type: none"> <li>• Content loaded directly into clients' proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 5 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique's Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: WMNI CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 18 modules</li> <li>❖ TBC e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> </ul> <p>Jargon buster</p>
<p><i>Exploded module information available upon request</i></p>	<p><i>Free appropriate and suitability assessment</i></p>



# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems

Product: Contemporary Unit Pricing (CUP Release v1)

*WIP under conversion from Masterclass Workshop to CPD on-line*

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 Contemporary and future pricing requirements: client demands and regulation are key drivers</p> <p>M2 Refresher on unitisation: collective investment vehicles</p> <p>M3 Delivering on best practice pricing issues and methodologies</p> <p>M4 Unit pricing policy: the use of discretion</p> <p>M5 Managing unit price risk and tax impact</p> <p>M6 Quality assurance operational risk and valuation oversight</p> <p>M7 Key elements in unit pricing cycle</p> <p>M8 Corporate governance: board/committee roles responsibilities</p> <p>M9 Where unit pricing often goes wrong ; breaches, errors and material events</p> <p>M10 Reconciling unit price movements</p> <p>M11 Criteria for investigating and resolving pricing errors matrix</p> <p>M12 What constitutes error and what is material?</p> <p>M13 Regulatory notification of errors and operational relationship</p> <p>M14 Outcome from unit pricing errors and correcting ownership errors</p> <p>M15 Consequences of methodology and “in-force” data</p> <p>M16 Investment in external unitised products e.g. fund of funds</p> <p>M17 Reconciling attribution of tax to unit pricing</p>	<ul style="list-style-type: none"> <li>• Content loaded directly into clients’ proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 5 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique’s Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: CUP CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 17 modules</li> <li>❖ TBC e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> <li>❖ Jargon buster</li> </ul>
<p><i>Exploded module information available upon request</i></p>	<p><i>Free appropriate and suitability assessment</i></p>



# Creative Content for Contemporary CPD on-line



London

Wellington

Research and design of world class content for CPD and on-the-job support systems

Product: Operational Risk for Banks (ORFB)

*WIP under conversion from Masterclass Workshop to CPD on-line*

MODULAR (content cascade from e-briefs to e-bites)	DELIVERY / ASSESSMENT/ CPD CREDITS/UPDATES
<p>M1 Why it is important to manage as it can bring down a bank</p> <p>M2 Tools for mitigating : Enterprise Risk Management System: Total Quality Management</p> <p>M3 Overview of operational risk</p> <p>M4 Capture of key controls</p> <p>M5 Internal understanding of operational risk</p> <p>M6 Sources of operational risk</p> <p>M7 The three lines of defence</p> <p>M8 Implementing an operational risk framework</p> <p>M9 Global payment and messaging systems e.g. SWIFT</p> <p>M10 Culture and performance questions</p> <p>M11 Checking Key Performance Indicators (KPIs)</p> <p>M12 Key areas of action</p> <p>M13 Case studies : learning from past operational risk failures</p> <ul style="list-style-type: none"> <li>➤ Rogue trading</li> <li>➤ Bernie Madoff and Ross Asset Management</li> <li>➤ Lessons from the Global Financial Crisis</li> <li>➤ Personal data misappropriation</li> <li>➤ Portfolio fabricated valuations for OTC instruments etc.....</li> </ul>	<ul style="list-style-type: none"> <li>• Content loaded directly into clients’ proprietary system in pdf format.</li> <li>• Content delivered to client nominated third party agent e-learning platform</li> <li>• Includes multiple choice assessment quiz</li> <li>• CPD qualifies for up to 5 structured hours</li> </ul> <p>Structure matches database so updates can be easily loaded with minimal client IT input. Dynamique’s Creative Intelligence CPD system is being continually updated.</p> <p>Big data stats: ORFB CPD consists of:</p> <ul style="list-style-type: none"> <li>❖ 13 modules</li> <li>❖ TBC e-briefs with sub-bites containing images, powerpoint and data charts where suitable and appropriate</li> <li>❖ Assessment questions multiple choice each with 4 options</li> <li>❖ Jargon buster</li> </ul>
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- ✓ Please email [contact@dynamique.co.nz](mailto:contact@dynamique.co.nz) if you are in the Southern Hemisphere
- ✓ Please email [investmentexcellence@dynamique.co.uk](mailto:investmentexcellence@dynamique.co.uk) if you are in the Northern Hemisphere

All regions generic contact number +64 210 425 766 – we look forward to hearing from you and helping to your organisation achieve your goals. Remember “Think the impossible, deliver the exceptional”, always put your client first and the Gods will provide.