Everything you need to know about successful index investing and investing in exchange traded funds (ETFs)

GOALS

The European ETF market has grown 18% per year since 2012 and will grow 15% p.a. until 2030 (EY). Why are they so successful? How are they used in portfolios? What are the risks?

This training aims to:

- learn the basics of active and passive ETFs;
- discover the whole ETF ecosystem and the trading and liquidity features;
- differentiate and choose the right index and ETF from a universe of >1.900;
- go deeper in sustainable, thematic and fixed income ETFs;
- define the role of an index ETF, an active ETF and a mutual fund in a portfolio.

SUMMARY

Category:

- Private banking & asset management

Difficultylevel:

Advanced

Certification type:

In class training

Price:

The joint pricing guidelines are applied as part of a joint initiative.

CPD hours:

- Bank: **6h** sector specific

INTENDED AUDIENCE

This training course is for investment professionals wishing to have a basic yet thorough overview of active and passive ETFs:

- independent financial advisors;
- tied agents;
- (life) insurance brokers;
- bank advisors;
- private bankers;
- portfolio managers;
- fund selectors.

FOREKNOWLEDGE

Advanced level training: this training requires a general basic knowledge of the subject.

CONTENT

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- ETF basics
  - introduction to index and active ETFs and industry dynamics
  - benefits & risks, types & classification, performance and costs, active versus index, managing an ETF, taxation & legal domicile
  - ETFs versus index mutual funds
- ETF ecosystem
  - liquidity and the creation-redemption process
  - trading
  - prices, (i)NAV, BID-ASK, discounts & premia
- ETF universe
  - classification: equity, fixed income, alternatives
  - overview and differences in indices and providers
  - due diligence processes of index and active ETF's
- A deeper dive into thematic, fixed income and sustainable ETFs
  - thematic ETF's and index methodologies
  - fixed income strategies
  - sustainability offering: screened, ESG integration, best-in-class, SRI, themes, impact, climate, transition, …
  - how to interpret ESG data, labels and sustainable regulations
- ETF portfolios
  - use-cases or how do the different investor types use ETFs in their portfolios
  - blending mutual funds, index and active ETF's in a portfolio
  - a practical & interactive exercise to build an ETF portfolio based on the current economic and market outlook

PRACTICAL INFORMATION

- **Duration:** 1 day of training (6 class hours)
- **Hours:** 09:00 to 17:00
- **Location:** Febelfin Academy: Phoenix building, Koning Albert II-laan/Boulevard du Roi Albert II 19, 1210 Brussels
- **Language:** This training will be given in English

METHODOLOGY

You follow a 'Classroom training' face-to-face in a group. You, the other participants and the teacher are all present in the same classroom at an agreed time. There is an opportunity for interaction and feedback, both from the participants to the teacher and vice versa. The teaching material consists as a basis of a presentation via the MyFA learning platform, supplemented with various other items (such as digital syllabus, presentation, audiovisual fragments, etc.).