ETF & Index Investing Training Course

Professional Development Training Course Outline

Category	Capital Markets and Investment	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Exchange-Traded Funds (ETFs) and index investing have transformed modern portfolio management by offering cost-effective, diversified, and flexible investment solutions. ETF & Index Investing Training Course is designed to equip participants with practical knowledge and analytical skills to navigate global financial markets, understand underlying indices, and optimize portfolio performance. Through a blend of theoretical foundations and real-world applications, this course enables investors, financial analysts, and portfolio managers to make informed decisions in fast-paced trading environments. Key topics include ETF structures, index tracking, passive and active investing strategies, risk management, and performance evaluation techniques.

This course emphasizes hands-on learning and case-based analysis, allowing participants to evaluate market trends, identify investment opportunities, and implement data-driven strategies. By integrating trending topics such as sustainable ETFs, thematic investing, and smart beta strategies, the program ensures that learners remain ahead of evolving market dynamics. Participants will gain the confidence to construct diversified portfolios, assess fund performance, and leverage ETFs for both long-term growth and short-term tactical positions. This course serves as a critical resource for professionals aiming to enhance investment performance, reduce costs, and drive organizational financial success.

Programme Curriculum

ETF & Index Investing Training Course

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Course Objectives

1. Understand the fundamentals of ETFs and index investing.
2. Analyze different types of ETFs including equity, bond, commodity, and sector ETFs.
3. Learn strategies for constructing diversified ETF portfolios.
4. Evaluate index performance and benchmarking techniques.
5. Apply risk management methods specific to ETF investing.
6. Explore passive versus active investing approaches.
7. Understand the impact of market trends on ETF performance.
8. Develop skills in thematic and sector-specific ETF selection.
9. Use ETFs for asset allocation and portfolio optimization.
10. Analyze liquidity, tracking error, and expense ratios of ETFs.
11. Examine regulatory frameworks governing ETFs and index funds.
12. Integrate sustainable and ESG-focused ETFs into investment strategies.
13. Conduct practical case studies on real-world ETF market scenarios.

Organizational Benefits

- Enhance investment decision-making capabilities across the organization.
- Optimize portfolio diversification and risk management practices.
- Improve cost efficiency in asset management operations.
- Strengthen analytical capabilities in evaluating fund performance.
- Enable informed adoption of emerging ETF trends.
- Increase alignment with regulatory and compliance standards.
- Promote data-driven investment strategies for sustainable growth.
- Support long-term strategic financial planning.
- Build team expertise in passive and active investment approaches.
- Foster a culture of continuous learning in financial innovation.

Target Audiences

1. Investment analysts and portfolio managers
2. Financial advisors and wealth managers

3. Institutional investors and fund managers
4. Private equity and venture capital professionals
5. Risk management professionals
6. Corporate finance executives
7. Individual investors seeking advanced knowledge
8. Asset management teams

Course Duration: 5 days

Course Modules

Module 1: Introduction to ETFs and Index Funds

- Definition, structure, and benefits of ETFs
- Difference between ETFs and mutual funds
- Types of indices and their roles
- Regulatory considerations
- Global ETF market trends
- Case Study: Comparative analysis of popular equity ETFs

Module 2: ETF Investment Strategies

- Passive vs active ETF investing
- Sector-specific and thematic strategies
- Smart beta and factor investing
- Tactical vs strategic allocation
- Hedging and leverage techniques
- Case Study: Building a tactical ETF portfolio

Module 3: Portfolio Construction and Asset Allocation

- Principles of diversification
- Strategic vs dynamic allocation
- ETF selection criteria
- Risk-adjusted performance measures
- Rebalancing techniques
- Case Study: Designing a multi-asset ETF portfolio

Module 4: ETF Performance Evaluation

- Benchmarking indices
- Tracking error analysis
- Expense ratio and cost considerations

- Liquidity and trading efficiency
- Performance attribution
- Case Study: Evaluating ETF performance during market volatility

Module 5: Risk Management in ETFs

- Market and sector risk
- Interest rate and currency risk
- Volatility management
- Portfolio stress testing
- Mitigating systemic risk
- Case Study: Risk assessment for global ETFs

Module 6: Thematic and Sector ETFs

- Growth of thematic ETFs
- Sector-specific investment opportunities
- Emerging market ETFs
- ESG and sustainable investing
- Integration into diversified portfolios
- Case Study: Comparative returns of thematic ETFs

Module 7: Advanced ETF Strategies

- Leveraged and inverse ETFs
- Options and derivatives for ETFs
- Hedging strategies
- Pair trades and market neutral approaches
- Tax efficiency in ETFs
- Case Study: Using leveraged ETFs for short-term strategies

Module 8: Practical ETF Analysis and Trading

- Technical analysis for ETF selection
- Evaluating liquidity and spreads
- Order types and execution strategies
- Portfolio tracking and monitoring tools
- Reporting and compliance considerations
- Case Study: Implementing ETF trades under real market conditions

Training Methodology

- Interactive lectures and concept discussions
- Hands-on portfolio simulation exercises
- Case study analysis and presentations
- Group discussions and peer learning sessions
- Live trading demonstrations
- Continuous performance feedback and assessments

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.
f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

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