

INSTRUCTUS MARKETS

Capital Markets Course & Proprietary Trading 5-day course

In Partnership with Coleman Capital

Agenda

navigating the financial world

Course Objectives

The primary objective of our 5-Day Course in Capital Markets Course is to give you the best opportunity to improve your employability. We want you to get a job in the City.

We achieve this by ensuring that participants have a full understanding of the structure, components and functions of capital markets

We have teamed up with Coleman London, a proprietary trading firm based in the City of London. The last 2 days of your course will be spent in their trading facility with live access to their dealing room, experiencing first hand how to trade live markets from professional traders.

Each attendee will receive comprehensive training from highly experienced traders and trainers. Coleman use a sophisticated trading simulation platform, allowing attendees to put into practice the theory they have learnt. By the end of your week long course you will have gained a unique insight into the world of capital markets and trading.

Our professional skills and CV section will give you all the skills you need to be successful in that application and then interview process.

We look forward to meeting you on the next course.

Biographies



Graham Smith

- Joined Dillon Read in 1996 before moving to Salomon Brothers as a Scandinavian and French Trader
- Started the TMT sector pitch at Salomon Smith Barney (later Citigroup)
- Promoted to MD age 30, running Pan-European and UK Mid Cap cash trading
- Global Head of Trading and Sales at Unicredit
- Now runs a Pan-European Hedge Fund for our partners, Trafalgar Capital



Giles Johnston

- Joined the City 25 years ago at NatWest Markets, trading UK small and mid caps
- Retail and Consumer trader at Citigroup, later made MD with responsibility for trading European Oil and Utility stocks
- MD Oil and Utility trading at Unicredit



Paul Thompson

- Over 30 years' experience in the UK, European and global equities markets
- Head of Institutional Clients at HSBC Investment Bank
- COO of EMEA Equities at Citigroup
- Deputy CEO of Oriel Securities
- Graduated from Corpus Christi College, Oxford

Introduction to Capital Markets

- **Role and Function of Capital Markets**
 - Why capital markets exist
 - How they came about
 - Capital raising
 - Primary and secondary listings
 - Market participants
- **Tradeable Asset Classes**
 - Equities, bonds, foreign exchange and commodities
 - Factors affecting prices
 - Investment characteristics
 - Recent developments in each class
 - Alternative investments
- **Asset Managers, Investment Banks and Brokers**
 - Buy side and sell side
 - The different types of investment funds
 - Venture capital and private equity
 - Hedge funds
 - Technology and investing, algo's dark pools and DMA
 - Performance measurement
- **Investment Bank – Divisions and Roles**
 - Primary – corporate finance and M&A
 - Secondary – research, sales and trading
 - Trade floor business lines
 - Prime broking
 - Institutional placing process
 - Operations
 - Chinese walls
- **The Changing Nature of Capital Markets**
 - New regulation
 - Continued technological development
 - Compliance
 - The future

Managing Investments and Portfolio Trading

- **Asset Correlation**
 - Investment rational post the financial crisis
 - Correlation between each asset class
 - Sector characteristics
 - Correlation – some strategies
 - Single stock
 - Positive and negative
 - Portfolio management
 - Recent influence of global monetary policy on correlation
 - Fiscal policy and the influence on capital markets
 - Current themes in the markets
- **Investment Process**
 - Investment mandates
 - Idea formulation and sources
 - Research – best ideas
 - Market feel and sentiment
 - How does the idea evolve into generation of revenue
 - Performance analysis
- **Portfolio Management, Risk and Volatility**
 - Portfolio management
 - Measuring risk, parameters, beta and VaR
 - Market volatility, the VIX and DXY
 - Cyclical and non cyclical sectors
 - Hedging to reduce market risk
- **Fundamental and Technical Analysis**
 - Interpreting macro economic data
 - Practical application of the basic financial ratios
 - Current macro economic data and its significance
 - Introduction to technical analysis (Bollinger, RSI, Fibonacci)
 - Using technical analysis alongside fundamental analysis
- **Psychology and Investing**
 - Understanding market sentiment and the path of least resistance
 - Investment and trading psychology
 - Market timing and developing your market feel
 - Accepting losses as part of the investment process
 - Understanding the importance of investor sentiment
 - Coping with performance pressures

Professional Skills and Financial Careers

- **CV and Covering Letter Development**
 - How to write an impactful CV and covering letter
 - Personal overview of your own CV's and covering letters
- **Application Process**
 - How to master the application process
 - Importance and use of industry knowledge
 - Significance of contemporary financial news
 - How to succeed and the usual pitfalls
- **Think Smart**
 - Thinking outside the box
 - Other avenues to pursue within finance
 - How to maximise your chances of employment
- **How to Stand Out from the Crowd**
 - Lateral thinking and how to catch peoples eye
 - Businesses and people
 - A few simple rules on what to do and what not to do
- **Speaking with Confidence**
- **Interviews**
 - Mock interviews and analysis
 - What to expect
 - How to impress
 - How to avoid the pitfalls

Overview and roundup of all three days content

Coleman London - Biographies

- **Stuart Jackman, Managing Director. Coleman Street Training**
 - CFA, CAIA, FRM graduated with a degree in Mathematics from Oxford University in 1996. His first role in the city was as a trainee actuary for Commercial Union (now Aviva), before moving into the fund management industry through a technology sector focused institutional investment advisor called Reabourne Technology Investment Management (later acquired by Close Investments). He gained over ten years experience with a focus on portfolio management and equity trading, and also has experience in hedge funds and fixed income portfolios. Since 2007 Stuart has worked primarily in professional education, delivering and formulating courses for major training providers.
- **Tim Hodges – CEO Coleman Group**
 - Over 20 years' experience in the industry, formerly a Vice President at Goldman Sachs International responsible for the Trading and Clearing Services business in the Equities Division. Tim also held senior positions in Equity Operations and Network Management. Before Founding Coleman Street Management Ltd, Tim managed his own Introducing Broker business for 5 years, with clients ranging from Hedge Funds to banks and Proprietary Trading businesses
- **Ernesto Becker. Head of Day Trading - Coleman Street Management LTD**
 - Ernesto attended the University of Amsterdam where he studied Financial Management and Monetary Economics. In 1995 he started working for Wolbers C.V., a stock specialist / market making firm in Amsterdam, where he traded options and futures on the EOE (European Options Exchange). In 1997 he became a stock specialist / proprietary trader first for Wolbers C.V. and after its takeover by AOT Stockspecialists N.V. for that company.
 - In 2000 he left AOT with 4 fellow traders to setup an equity desk for a local market making firm, Accent Groupe. Eventually responsible for a team of 15 traders, he led the company through a transition from being a pure classic day trading firm on the Amsterdam Stock Exchange to becoming a highly profitable day- / swing trading firm, trading on different European exchanges.
 - At Accent Groupe he was also the liaison between the trading and the I.T. department as well as responsible for the firm's contacts with its Prime Broker, brokers, regulators and exchanges.
 - After this successful transition he decided to once again focus on his profitable trading strategies and has been doing so for Accent, Dinosaur Merchant Bank London Ltd. and now for Coleman Capital Ltd.

The Principles of Day Trading

DAY 1

- **Day One Trader Position Case Study**
 - Overview of a real time position taken that day to act as a case study for the discussions that follow
 - Introduction to the trading simulator
- **The Principles of Day trading**
 - A set of core principles that underlie a successful day trader
- **The Psychology of Day Trading**
 - A list of behavioural traits that affect day traders
- **Technical Analysis**
 - Overview of technical tools used by day traders, chart patterns and their psychology
 - Market sentiment indicators
- **Fundamental Analysis**
 - Overview of important macroeconomic indicators and their current impact on financial markets
 - Industry and company analysis and valuation metrics

Day 2

- **Day Two Trader Position Case Study**
 - Overview of a real time positions taken that day to act as a case study for the discussions that follow
- **Risk Management**
 - Overview of risk management techniques employed by day traders
- **Introduction to Bloomberg**
 - Overview of the main data functionality and screen setups used by day traders
- **Trading Simulation Exercise**
 - Candidates are encouraged to identify trading ideas and place trades on the trading simulator

Contacts

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