

COURSE TITLE:**Investment Essentials: Navigating Capital Markets****PROFESSOR: Pedro Pérez Ríu****BRIEF COURSE DESCRIPTION**

The world of finance and investments can often seem complex and overwhelming. This comprehensive course aims to demystify the intricacies of capital markets and provide learners with a solid foundation in investment principles and opportunities.

Through engaging and interactive video lessons, you'll explore primary and secondary markets, learn about money market instruments and operations, delve into the global bond market, understand equity investments in common and preferred stocks, explore alternative investment options like commodities and real estate, and discover the benefits of mutual funds and exchange-traded funds (ETFs).

By the end of this course, you'll possess the knowledge and skills to understand investment decisions and tap into the potential of capital markets. Whether you're a novice investor or a finance professional seeking to expand your expertise, this course is your gateway to the exciting world of investments.

COURSE DESCRIPTION

The world of finance and investments can often seem complex and overwhelming. This comprehensive course aims to demystify the intricacies of capital markets and provide learners with a solid foundation in investment principles and opportunities.

Through engaging video lessons and examples, this course takes learners on a journey into the fascinating realm of capital markets. Starting with an introduction to the primary and secondary markets, participants will understand the fundamental pillars of finance and how investments are traded.

Exploring the money market, learners will gain insights into the various instruments and operations that drive short-term borrowing and lending. From Treasury bills to commercial paper, participants will grasp the dynamics of this vital market segment.

The course then delves into the global bond market, shedding light on fixed income securities and their role in investment portfolios. Learners will examine the US bond market and other debt instruments, understanding their features and analyzing credit risks associated with fixed income investments.

Equity investments take center stage in the next module, as participants explore the world of common stock and preferred stock. They will gain a deep understanding of the fundamentals of equity investments and the nuances of investing in different types of stocks. Furthermore, learners will explore US stock indexes and their impact on investment strategies.

The course also examines alternative investment opportunities, including commodities and real estate. Participants will discover the unique characteristics and potential benefits of investing in these alternative asset classes.

Finally, the course concludes with an exploration of mutual funds and exchange-traded funds (ETFs), popular investment vehicles that offer diversification and professional management. Learners will compare and contrast the features, benefits, and risks associated with these investment options.

By the end of this course, participants will have a solid grasp of capital markets and investment. They will be equipped with the knowledge to understand investment decisions and navigate the complex world of finance with confidence.

Whether you are a novice investor, a finance professional looking to enhance your knowledge, or simply curious about the dynamics of capital markets, this course provides the essential building blocks for your investment journey.

PROFESSOR'S BIO

Pedro Pérez Ríu has been working in capital markets for 30 years. He is a Wall Street veteran. He has been involved with global fixed income markets, in its emergent market segment since 1994, first as an analyst, then 20 years as a credit trader. The last 3 years he has been managing an emerging markets bond fund. Most recently, he has found his passion in teaching in several different programs as adjunct faculty of IE University.

LEARNING OBJECTIVES FOR THE COURSE

Learning objectives for this course:

LESSON 1 - Introduction to Capital Markets

1. Understand the concept of capital markets and their role in the world of investments.
2. Differentiate between primary and secondary markets and their significance in financial markets.

Lesson 2 – Exploring the Money Market: Instruments and Operations

3. Identify various instruments used in the money market and their characteristics
4. Explain the operations and functions of the money market.

Lesson 3 – Global Bond Market: A Comprehensive Overview of Fixed Income Securities and Opportunities

5. Define fixed income securities and their importance in investment portfolios.
6. Analyze the US bond market and other debt instruments, including their features and risk factors.
7. Understand the relationship between credit risks and fixed income investments.

Lesson 4 – Equity Investments 101: Common Stock & Preferred Stock Exploration

8. Describe the fundamentals of equity investments, focusing on common stock.
9. Explore the concept of preferred stock and its role in investment strategies.
10. Gain insights into US stock indexes and their significance for diverse investment opportunities.

Lesson 5 – Commodities, Real Estate, and Alternative Investments

11. Examine the characteristics and investment potential of commodities.
12. Understand the basics of real estate investments and their role in portfolios
13. Explore alternative investments and their diversification benefits

Lesson 6 - Mutual Funds & ETFs

14. Define mutual funds and exchange-traded funds (ETFs) and their purpose in investment management
15. Compare and contrast the characteristics and features of mutual funds and ETFs

Learning outcomes for this course:

After completing this course, students will be able to:

1. Demonstrate a comprehensive understanding of capital markets, including primary and secondary markets.
2. Explain the functions, instruments, and operations of the money market.
3. Analyze the global bond market and identify various fixed income securities.
4. Evaluate the relationship between credit risks and fixed income investments.
5. Interpret the fundamentals of equity investments, common stock, and preferred stock.
6. Identify investment opportunities in commodities, real estate, and alternative investments.
7. Compare and contrast mutual funds and ETFs.

HOW WE CAN MEASURE THESE?

Quizzes or assignments:

- An automatically graded final course test or assignment that should include analytical and practical questions to apply the newly-learned skills from the course.