



SUNGARD SOLUTIONS FOR BROKERAGE & CLEARANCE

FINANCIAL SERVICES RELATED COURSE LISTING

Accounting	
Introduction to Accounting	Introduction to Financial Statements
A Framework for Financial Statements	The Balance Sheet and Income Statement
Financial Reporting Standard	
Asset Management	
Financial Markets and Institutions	Benchmark Portfolios
Investment Companies and Returns	Capital Allocation
Investment and Probability Distributions	Diversification and Correlation
Investment Risk and Return Investment Risk and Return	Security Selection
Investor Preferences	
Bank Asset and Liability Management	
Overview of Bank ALM	Measuring I/R Risk 1 – Traditional Approaches
Bank Financial Statements	Measuring I/R Risk 2 – Duration Approach
Risk and Capital Management in Banking	Measuring I/R Risk 3 – Simulation Approach
Bank Capital	Using Derivatives to Manage Interest Rate Risk
Basel 1 – The 1988 Capital Accord	An Introduction to Basel II
Liquidity Risk and Liquidity Adequacy	Implementing Basel II
The Conflict Between Prudence and Profitability	Basel II – The Standardized Approach
Corporate Finance	
Introduction to Corporate Finance	Optimal Capital Structure
Understanding Financial Statements	Introduction to Project Finance
Financial Statement Analysis	Project Finance
Company Valuation Models	Introduction to Mergers and Acquisitions
The Valuation Process	Valuing Mergers and Acquisitions
Dividend Discount and FCF Models	Introduction to Financial Modeling
Income and Price Multiples	Completing and Using a Financial Model
Introduction to Capital Structure	
Credit	
Introduction to Credit Risk	Credit Process for Personal and Corporates
External Influences on Credit Risk	Credit Risk Mitigation Techniques
Strategic Approaches to Credit Risk	Monitoring and Control of Credit Risk
Credit Risk Management and Measurement	Monitoring Personal and Corporate Credit
Credit Risk Policy	Problem Credit Management
Classification and Measurement of Credit Risk	Handling Problem Accounts
EAD, LGD, EL and UL	Credit - Learning from Experience
Credit Assessment and Decision Making	Lending Policy – Lessons Learned

Credit Derivatives	
Overview of Credit Derivatives	Credit Default Swaps
ISDA Credit Event Protocols	Technical Aspects of CBOs, CLOs and CDOs
Introduction to CBOs, CLOs and CDOs	
Derivatives	
Forwards and Futures Contracts	Hedging Strategies for Non-Option Products
FRAs	Hedging Strategies for Options
STIR Futures	Introduction to FAS133
Introduction to Options	Hedging under FAS133
Option Building Blocks and Portfolios	Introduction to Energy Derivatives
Hedging with Options	Oil and Gas Derivatives
Option Pricing – The Black –Scholes Model	Coal, Electricity and Carbon Derivatives
Option Pricing – Monte Carlo and Binomial Models	Introduction to Commodity Derivatives
Option “Greeks”	
Equities and Equity Derivatives	
Introduction to Equities	Convertibles
IPOs	Equity Valuation
Introduction to Equity Index Futures	Equity Swaps
Hedging with Equity Index Futures	Introduction to Equity Options
Index Arbitrage	
Warrants	
Fixed Income	
Money Market Instruments	Mortgage Backed Securities
Fixed Income Securities	Bonds with Embedded Options
Bond Math and Analytics	Convertibles
Duration and Convexity	Repos
Corporate Bonds	Bond Futures
High-yield and Emerging Market Bonds	Interest Rate Swaps
Relative Value in the Fixed Income Markets	Interest Rate Caps, Floors, and Collars
Foreign Exchange	
Introduction to Foreign Exchange	Introduction to Currency Swaps
Foreign Exchange Spot	Features of Currency Swaps
Introduction to FX Forwards and Swaps	FX Options
Using FX Forwards and Swaps	
Introduction to Banking and Financial Markets	
Introduction to Investment Banking	Introduction to Financial Markets and Products
Islamic (Shariah) Banking	
Introduction to Islamic Finance I	Essentials of Islamic Finance
Introduction to Islamic Finance II	Murabaha, Bay Muajjal, and Tawarruq
Life Cycle of a Trade	
Overview of the Trade Life Cycle	The Settlement Process
Pre-Settlement: Part 1	Other Aspects of Settlement
Pre-Settlement: Part 2	Post-Settlement

Compliance	
Introduction to Money Laundering	The Money Laundering Process
Risk Management	
An Overview of Banking Risk	Basis and Correlation Risks
An Overview of Market VaR	Operational and Model Risk
Statistical and Financial Foundations	
Time Value of Money	Curve Fitting
Basic Statistics	Yield Curve Concepts
Probability and Probability Distributions	Term Structure of the Yield Curve
Normal and Other Distributions	Creating a Smooth Yield Curve
Correlation and Regression	Modeling the Yield Curve
Wealth Management	
Understanding your Customer	Understanding Equity Investments
Financial Goals and Attitudes Towards Risk	Measuring Equity Returns
Understanding Fixed Income Investments	Managing an Equities Portfolio
Managing a Bond Portfolio	

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