

# Lesson Plan: UT/ILP Master Class Refresher



UT/ILP Master Class Refresher revises, summarizes & refines the concepts of the UT/ILP Investment Sales Master Class

Topic No.	Revision of Topic	Description	Outcomes	Time (min)/ Delivery
1.	Applying fundamental indicators	Communicate current uncertainty in terms of fundamental indicators thereby answering the question, 'what is your view on the market'.	Revision of fundamental indicators to increase confidence In answering questions on the market.	15
2.	Understanding long-term framework and how to communicate it	Use probability of positive and negative returns, range of total returns and maximum and minimum returns across a number of asset classes like Singapore equity, global, regional, single country to understand and communicate why long-term investing is important.	Revision of key concepts in understanding and communicating the long-term framework and how they interlink with each other.	60
3.	Importance of topping up the portfolio/Reaping rich rewards by being regular	Understand how topping up helps to mitigate low long-term returns arising out of the inherent variability of riskier asset classes and event risk both in the case of regular investing through dollar cost averaging and one time investment through single premium.	Review of the importance of topping up the portfolio and how to use it as a tool to handle uncertainty of investing.	60
4.	What is a good fund/ILP	Analyse the framework of 10-calendar years of fund returns vs benchmark as the primary determinant of what constitutes a good actively managed fund.	Reinforcement of the understanding of what constitutes a good fund and how to mitigate when a fund is underperforming.	45

A total of 3 CPD hours are awarded and full set of A4 placemats to explain the concepts are provided