



PLV ADVANCE BUSINESS
CONSULTING SDN BHD

Professional learning and development

Financial Analysis with AI

Decision-Making Process in Investment and Portfolio Management

8 December 2026 | 9:00am–5:30pm | Physical training

Suitable for Capital Markets Services Representative's Licence (CMSRL) holders and Employees of Registered Persons (ERPs) seeking to fulfil SIDC CPE requirements.

LEARNING OBJECTIVES

Upon completion of this course, participants will be able to:

1. Explain investment and portfolio management concepts.
2. Identify key financial metrics to evaluate investment performance.
3. Summarize diversified portfolio strategies for effective asset allocation and investment goals.
4. Describe how AI tools utilized to analyze financial data, enhance investment and portfolio management.

LEARNING EXPERIENCE

A practical refresher

- Delivery Medium: Instructor Led Course, Lectures, Hands-on AI demonstrations, Case studies, Group discussions, and Practical exercises.

TRAINER

Mr. Primus Lim

Director and Principal Trainer
HRD Corp Accredited Trainer

Public programme | Refresher level | 7 training hours excluding breaks

COURSE OUTLINE

Financial Analysis with AI

Decision-Making Process in Investment and Portfolio Management

Time: 9:00 – 10:30 - 1 hour 30 minutes

1. Introduction to Investment and Portfolio Management

Description:

- Understanding Investments: Purpose, returns, and risks.
- Fundamentals of Portfolio Theory: Risk-return trade-off and diversification.
- Required Rate of Return: Components, including real risk-free rate, inflation, and risk premium

Speaker: MR. PRIMUS LIM

Time: 10:45 – 13:00 – 2 hours 15 minutes

2. Quantitative Measures: Risk and Return Analysis

Description:

- Quantifying Returns: Historical versus expected rates of return
- Measuring Risk: Concepts such as variance, standard deviation, and the coefficient of variation
- Risk-Return Profiles: Comparison of different asset classes

Speaker: MR. PRIMUS LIM

Time: 14:00 – 15:30 – 1 hour 30 minutes

3. Asset Allocation and Security Selection

Description:

- The Importance of Asset Allocation: Policy weights and diversification benefits.
- Role of Different Asset Classes: Stocks, bonds, and other instruments.
- Building a Diversified Portfolio: Balancing risk and return.

Speaker: MR. PRIMUS LIM

Time: 15:45 – 17:30 – 1 hour 45 minutes

4. Applying AI to Investment and Portfolio Management

Description:

- Overview of AI in Financial Analysis: Automation and predictive modelling.
- AI for Risk Assessment: Identifying patterns and market anomalies.
- Integrating AI in Decision-Making: Real-world applications and tools.
- **Speaker: MR. PRIMUS LIM**

Time: Course Conclusion (17:30):

- Recap of key takeaways • Open Q&A session, Evaluation Form • Distribution of certificates of participation



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Course Information

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TARGET AUDIENCE

1. Finance & Investment Professionals

- Investment Analysts, Portfolio Managers, Fund Managers
- CFOs, Finance Managers, Accountants, Financial Analysts
- Risk and Compliance Officers in financial institutions

2. Banking & Corporate Sector

- Relationship Managers and Loan Officers in Banks
- Corporate Strategists, Treasury Teams, and Decision-Makers
- Executives in Investment Banks, Asset Management, and Brokerage Firms

3. Technology & AI in Finance

- Data Analysts working on financial datasets
- AI and Machine Learning Specialists focusing on predictive analytics, risk modeling, and financial automation
- Tech professionals integrating AI tools into investment decision-making and Portfolio Management

HRD CORP CLAIMABILITY

- Remarks: Fully HRD Corp claimable subject to HRD Corp approval
- HRD Corp Training Programme No.: 10001594436
- HRD Corp Focus Area: FinTech

- HRD Corp Skill Area: Industry 4.0

Status: Active | Type: Public | Total Training Hours: 7 Hours | Location: Bukit Jalil, Kuala Lumpur.

DATE AND VENUES

Tuesday 8 December 2026

Registration 8:30am

Training 9:00am–5:30pm

VENUE

a.) Hyatt Place Kuala Lumpur Bukit Jalil, M-1, Pusat Perdagangan Bandar, Persiaran Jalil 1, Bukit Jalil, 57000 Kuala Lumpur.

b.) Alternatives venue at Regus Aurora Place Bukit Jalil, 57000 Kuala Lumpur.

FEES PER PARTICIPANT

RM 1,600.00

Includes training materials, meals and refreshments, and Certificate of Attendance.



Course Justification

Financial Analysis with AI | 8 December 2026

The Financial Analysis with AI training is designed to equip professionals with essential investment and portfolio management skills, integrating traditional financial analysis with modern AI-driven decision-making tools. As financial markets become increasingly complex, professionals must adapt to data-driven investment strategies to enhance risk assessment, portfolio optimization, and market forecasting. This course is highly relevant for industry practitioners as it aligns with global investment trends, technological advancements in finance, and regulatory expectations. AI-driven financial analysis helps improve efficiency, accuracy, and decision-making in investment strategies, benefiting portfolio managers, analysts, and financial professionals. The course also supports professional development by enhancing critical thinking, risk management, and data interpretation skills, ensuring participants remain competitive in the evolving financial landscape. By bridging fundamental investment principles with AI-enhanced analytical tools, this course provides practical, industry-relevant insights, making it a valuable learning opportunity for professionals looking to stay ahead in investment and portfolio management.

TRAINING PROVIDER APPROVALS

SIDC CPE recognition

PLV Advance Business Consulting Sdn Bhd is an SIDC-approved CPE training provider. This programme carries 10 CPE points, subject to SIDC CPE requirements.

FIMM CPD applications

PLV is also a FIMM-approved CPD training provider. This course currently has no FIMM CPD points. PLV can apply for FIMM CPD points, subject to early application and FIMM approval.

FOR INQUIRIES PLEASE CONTACT

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