



Structured Products in Capital Markets

AI-Assisted Analysis, Portfolio Design and Risk Control

28 January 2027 | 9:00AM–1:15PM | Microsoft Teams live webinar

This programme is designed to equip capital market professionals with practical knowledge and analytical skills to understand, evaluate and apply structured products within investment and portfolio management contexts.

LEARNING OBJECTIVES

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

1. Explain the structure, features and payoff mechanisms of structured products used in capital markets.
2. Analyse the risk–return characteristics of structured products under different market scenarios.
3. Evaluate the role of structured products in portfolio construction and investment strategy formulation.
4. Apply AI-assisted analytical tools to support scenario analysis, product evaluation and risk control in structured product investments.

LEARNING EXPERIENCE

Delivery Medium: Instructor-Led Live Online Training (Virtual Classroom) incorporating structured lectures, AI-assisted demonstrations, guided case studies, interactive discussions, real-time polling/quizzes, and supervised assessments via Learning Management System (LMS).

SPEAKER(S):

MR. PRIMUS LIM

(Trainer's Profile Mr. Primus Lim.pdf)

Public programme | Intermediate level | 4 training hours



COURSE OUTLINE

Structured Products in Capital Markets | Sessions 1 and 2

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

Speaker: MR. PRIMUS
LIM

1. Introduction to Structured Products in Capital Markets

Description:

- Overview of structured products and their role in capital markets.
- Key features of structured products: capital protection, yield enhancement and participation.
- Basic payoff structures and how returns are generated.
- Comparison between traditional investments and structured products.

Time: 10:00AM –
11:00AM – 1 hours 00
minutes

Speaker: MR. PRIMUS
LIM

2. Risk–Return Characteristics of Structured Products

Description:

- Understanding underlying assets and embedded components.
- Risk–return trade-offs in structured products.
- Scenario analysis: upside, downside and breakeven outcomes.
- Key risks: market risk, credit risk and liquidity risk.



COURSE OUTLINE

Structured Products in Capital Markets | Sessions 3 and 4 and assessment

Time: 11:15AM –
12:15PM – 1 hour 00
minutes

Speaker: MR. PRIMUS
LIM

3. Portfolio Application of Structured Products

Description:

- Role of structured products in portfolio construction.
- Matching structured products to investment objectives and risk appetite.
- Diversification and income enhancement considerations.
- Case illustration of structured products within a portfolio.

Time: 12:15PM –
01:15PM – 1 hour 00
minutes

• Speaker: MR. PRIMUS
LIM

4. AI-Assisted Analysis and Risk Control for Structured Products

Description:

- Overview of AI tools used in structured product analysis.
- Using AI to simulate payoff scenarios and stress test outcomes.
- AI-assisted support for risk monitoring and decision-making.
- Interpretation of AI outputs for investment and portfolio decisions.
- Guided scenario-based discussion / case illustration with participant interaction.

Assessment & Wrap-Up: 01.15PM

- Key takeaways and application points.
- Post-training assessment (LMS-based).



Course Information

Structured Products in Capital Markets

AI-Assisted Analysis, Portfolio Design and Risk Control

TARGET AUDIENCE

- Investment Professionals and Portfolio Managers
- Treasury and Risk Management Professionals
- Private Bankers and Relationship Managers
- Fund Managers and Investment Analysts
- Capital Market Dealers and Structured Product Specialists
- CFOs, Finance Managers and Senior Management involved in investment decisions

ONLINE LEARNING

Delivery Medium: Instructor-Led Live Online Training (Virtual Classroom) incorporating structured lectures, AI-assisted demonstrations, guided case studies, interactive discussions, real-time polling/quizzes, and supervised assessments via Learning Management System (LMS).

The Microsoft Teams class link will be provided through the LMS.
<https://academylms.plvadvancebusiness.com>

HRD CORP CLAIMABILITY

Fully HRD Corp claimable subject to HRD Corp approval

- HRD Corp Training Programme No.: 10001670315
- HRD Corp Focus Area: FinTech
- HRD Corp Skill Area: Industry 4.0

DATE AND DELIVERY

Thursday 28 January 2027

Registration 8:30AM–9:00AM

Training 9:00AM–1:15PM

VENUE

Microsoft Teams live webinar

FEES PER PARTICIPANT

RM500.00

Fees inclusive of program materials and Certificate of Attendance.

Status: Active | Type: Public

- HRD Corp Type of Learning: Non E-Learning
- HRD Corp Type of Training: Remote Online Training (Public)



Programme Justification

Structured Products in Capital Markets

AI-Assisted Analysis, Portfolio Design and Risk Control

This programme is designed to equip capital market professionals with practical knowledge and analytical skills to understand, evaluate and apply structured products within investment and portfolio management contexts. As structured products are increasingly used for capital protection, yield enhancement and risk-controlled participation in capital markets, professionals are required to understand their structure, payoff mechanisms and risk–return characteristics to support informed decision-making.

The course integrates AI-assisted analytical tools to enhance the analysis of structured products, including scenario simulation, payoff evaluation and risk assessment. By combining structured product fundamentals with technology-enabled analysis, participants gain practical exposure to how structured products are assessed and applied in real-world portfolio design and risk control processes.

This programme is particularly relevant for professionals involved in investment advisory, portfolio management, treasury, private banking and risk management functions, where structured products form part of client solutions or investment strategies. The course focuses on applied understanding rather than product structuring or advanced engineering, ensuring suitability for a 4-hour online professional development programme.

Through guided analysis, case illustrations and scenario-based discussion, participants enhance their ability to interpret structured product features, assess risks and evaluate suitability within portfolios, while leveraging AI tools as decision-support mechanisms. The programme supports continuous professional development by strengthening technical competence, analytical thinking and practical application in structured product investments.

ENQUIRIES AND REGISTRATION

Contact Person(s): Mr. Primus Lim and Ms. Yong
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Professional Development

Structured Products in Capital Markets

1. SIDC – 10 CPE POINTS JUSTIFICATION (STRUCTURED ONLINE)

This programme is structured as a 4-hour structured online training delivered in an active learning mode, incorporating live instruction, guided case discussions, LMS-based assessments and documented participant engagement.

Under the Guidelines on Compliance with the Continuing Professional Education Requirement (SC-GL/4-2018), participants attending a structured online course of three (3) hours or more are eligible for 10 CPE points under the Active Learning Mode, subject to course approval by SIDC and the presence of assessments and verifiable records.

The programme satisfies these requirements as it:

- Is delivered as a structured online course.
- Incorporates assessments and interactive activities during and after the training.
- Provides verifiable records of attendance, engagement and assessment outcomes via an LMS.
- Focuses on capital market technical competencies, specifically structured products and portfolio application, aligned with the Industry Competency Framework.

Accordingly, participants who complete the full 4-hour programme are eligible to be awarded 10 SIDC CPE points, subject to SIDC approval.

Participant learning is reinforced through supervised scenario-based discussions, real-time AI-assisted demonstrations, and LMS-recorded assessment activities, satisfying SIDC's Active Learning Mode requirements.

FIMM CPD STATUS

PLV is a FIMM-approved CPD training provider. FIMM CPD points are not currently confirmed for this programme. Applications are subject to early application and FIMM approval.

TRAINING PROVIDER APPROVALS

PLV Advance Business Consulting Sdn Bhd is an approved CPE and CPD Training Provider under Securities Industry Development Corporation (SIDC), Federation of Investment Managers Malaysia (FIMM) and HRD Corp.

This programme carries 10 SIDC CPE points, subject to SIDC CPE requirements.