FINANCIALEDGE

Sovereign Wealth Fund

Case Study

We have worked with this government-owned investment company for several years, running a new hire program. At the end of the program, the associates needed to possess a comprehensive technical skill set and be ready to work on real deals, creating value for the fund.

CLIENT

A Singapore-based global investment company

PROGRAM

New analyst entry training program

LOCATION

Singapore

PARTICIPANTS

40 new associates

INSTRUCTORS

1

Dr. Colin Dooling

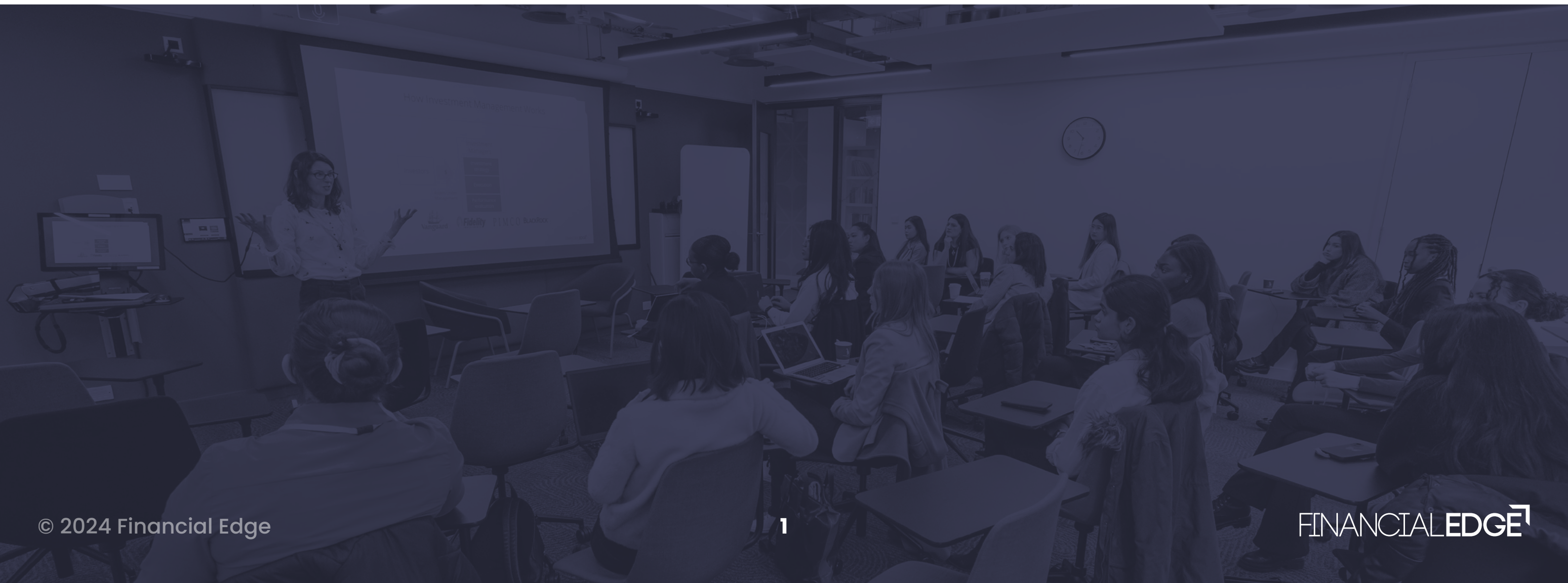
—

INSTRUCTOR

1. The Challenges

Diverse Backgrounds

The primary challenge for this program was the diversity of experience within the cohort. Economics and finance graduates needed to become technically competent in the same time frame as lateral hires, who possessed a great deal of industry, but not financial, experience. This required a two-speed program, delivered by one trainer.



2. The Solution

Level the Playing Field

Felix, our on-demand toolkit for analysts and associates, was crucial in creating a level playing field across the class. The searchable library of 3000+ tagged videos allowed students to fill knowledge gaps when they arose, pre-, post, or during instructor-led sessions.

Encourage Collaboration

Because these associates work across so many industries, we decided to produce a case study based on the investment committee presentation. This encouraged students to work collaboratively, in small groups, and also allowed them to practice presentation and PowerPoint skills.

Advanced Training

Several months later, we conducted a follow-up, in-person program. This allowed us to teach more advanced valuation, LBO and modeling skills without overwhelming students at the beginning of their careers. Crucially, it also gave students, who may have been nervous to admit skill gaps or confidence issues to their colleagues or seniors, the chance to get face-to-face help from our instructor.

40
Participants

15
Days

STAGE 1

Adaptive, asynchronous pre-work, covering excel basics, earnings, working capital, debt, modeling, financial math and valuation principles.

STAGE 2

15 days of in-person training covering accounting (including M&A), modeling (including LBO), 3 days of valuation, 3 days of M&A and LBO analysis and 2 days of case study work, including presentations.

STAGE 3

CPD delivered in person in the months following the main program.

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3. The Impact

Desk-ready

The client was extremely pleased with the skills the new hires acquired over the program. By the time they arrived at the desk, they had experience using real market and company data to solve problems and form considered opinions on potential investments.

Felix

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