

Investment Workshop @ Newton Chinese School

【Semester Arrangement】

Fall 2017 – Spring 2018

【Course Description】

This is not a typical investment workshop. We don't care what theory tells us but care what really matters. Through real case studies, the workshop will be conducted in an interesting, interactive and intelligent fashion to draw practical takeaways for your investment decision making in your daily life. The workshop will cover stock market, real estate and private equity with deep dive into different sectors and geographic segments.

【Lecturer Introduction】

Dennis Zhang, held PhD in Economics from Boston University. Dennis is currently a VP of Risk Management at State Street with 8+ years of strategic consulting and quantitative modeling experience in energy and financial industry. He is passionate for investment, strategy and technologies.

【Workshop Syllabus】

The workshop will focus on different investment areas and strategies. Through interactive conversation and discussion of investment product, strategy, history and case studies, practical takeaways will help with your decision making in investment.

1. Equity Stock – Consumer
2. Equity Stock – Energy
3. Equity Stock – Financials
4. Equity Stock – Info Tech
5. Equity Stock - Health Care
6. Equity Stock – Real Estate
7. Equity Stock – Tele Comm
8. Equity Stock - Utilities
9. Fixed-Income Securities
10. Real Estate Investment
11. Mortgage/HELOC/Refinancing
12. Medical/Auto/Life Insurance

13. Forex Trading
14. Commodity Trading
15. Options Trading
16. Education Fund Setup
17. Taxation of Investment
18. Digital Currency/BitCoin/Blockchain
19. Cross-Market Arbitrage
20. China Market History and Lessons
21. Europe Market History and Lessons
22. North America Market History and Lessons
23. Merge and Acquisition History and Lessons
24. Private Equity Investment
25. Ventures Investment
26. China-US Cross-Border Tech Transfer Opportunities
27. Investment Opportunity in Artificial Intelligence
28. Investment Opportunity in Blockchain
29. Investment Opportunity in Autonomous Driving
30. Investment Opportunity in Education
31. Investment Opportunity in FinTech
32. Investment Opportunity in Health Care