Investment Management 投資管理

Financial Postgraduate Programme Series

How can you keep up with the ever-changing world? Continuing education is the way to enhance your competitiveness. It is now the perfect timing for you to learn and enhance your competitiveness. This would be the best investment in yourself.

Our programmes cover various areas, including Investment Management, Financial Technology, Financial Engineering and Data Analytics.

Master of Science in Finance and Data Analytics
Programme Code: FN058A

Application Code: 1950-FN058A
2520 4612
mscdata@hkuspace.hku.hk

University of Essex x HKU SPACE

Master of Science in Finance and Data Analytics (MSC FDA), in collaboration with Essex Business School of the University of Essex, is a 2-year part-time taught postgraduate programme for those with interests in big data and data analysis who want to work in specialist roles within the finance and investments sector.

Applicants should hold a Bachelor (Honours) Degree with a lower-second class honours (2:2) or above in a numerate discipline such as Economics, Finance, Mathematics, Statistics, Science or Engineering. The Degree should contain at least one module relating to Economics or Finance (e.g., Mathematics (calculus), quantitative finance/methods or Econometrics (probability, statistics)) with a score of 50% or a pass in the module.

If the bachelor degree has not been taught and examined in English, applicants should have IELTS 6.5 overall with a minimum component score of 5.5. Applicants with other qualifications and substantial senior level work experience will be considered on individual merit.

Programme fee with 2 exempted modules: GBP15,500 (for 20-credit module, the module fee is GBP1,722 per module; for 40-credit dissertation module, the module fee is GBP3,446 per module).

Remark: Applicants with relevant academic and/or professional qualifications may approach the Programme Team for application of exemption.

Postgraduate Diploma in Finance and Data Analytics
Programme Code: FN050A

Application Code: 1945-FN050A

The programme covers a wide range of knowledge in Statistical Analysis, Corporate Finance, Risk Analysis and Asset Allocation, as well as Investment and Portfolio Management, Financial Modelling and Analytics Software. Students will learn how to apply the knowledge and techniques used by market professionals and refresh their investment knowledge using big data.

Applicants shall hold a bachelor’s degree in quantitative areas (e.g., mathematics, engineering, statistics, computer science, economics, finance) awarded by a recognised institution.

If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

i. an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
ii. a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
iii. HKALE Use of English at Grade E or above; or
iv. HKDSE Examination English Language at Level 3 or above; or
v. equivalent qualifications.

Applicants with other qualifications and substantial senior level work experience will be considered on individual merit.

Remark: Applicants with relevant academic and/or professional qualifications may approach the Programme Team for application of exemption.

Postgraduate Diploma in Applied Financial Engineering
Programme Code: FN041A

Application Code: 1935-FN041A

Financial engineering requires the application of mathematical methods and information technology to analyze financial problems quantitatively. Financial engineers are responsible for creating structured financial products, building mathematical risk models as well as developing algorithmic trading system which facilitate effective investment decision making, managing financial and investment risk with quantitative modeling and computing technology. This programme is designed for those who plan to pave their career path as a financial engineer or quantitative analyst. The programme is taught by financial and investment practitioners, who are all senior professionals from investment banks or finance industry.

Applicants shall:

A) i. hold a bachelor’s degree awarded by a recognized institution, with 3 years’ relevant work experience; OR
ii. possess a recognized qualification in financial industry such as CFA, FRM, etc. with 3 years’ relevant work experience; and
B) provide evidence of English proficiency (if the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English) such as:

i. an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
ii. a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
iii. HKALE Use of English at Grade E or above; or
iv. HKDSE Examination English Language at Level 3 or above; or
v. equivalent qualifications.

Applicants with other professional qualifications and relevant work experience will be considered on individual merit.

HK$4,300 per module
Application Fee: HK$150
1 year to 2 years

Postgraduate Diploma in Investment Management
Programme Code: FN018A

Application Code: 1945-FN018A

This Postgraduate Diploma is one of the most comprehensive courses offered by HKU SPACE in Investment Management. It is designed to follow the CFA syllabus and to focus on the current market trends and regulatory progression. This programme attracts a diverse group of students with background from finance, engineering, technology, business, management, government. Tutors are all market practitioners.

Applicants shall hold a bachelor’s degree awarded by a recognized institution.

If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

i. an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
ii. a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
iii. HKALE Use of English at Grade E or above; or
iv. HKDSE Examination English Language at Level 3 or above; or
v. equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

HK$9,000
Application Fee: HK$150
1 year to 2 years

For more and latest programme information, please visit our website hkuspace.hku.hk
Postgraduate Diploma in Investment Management and Financial Intelligence
Programme Code: FN044A
Application Code: 1945-FN044A

The programme aims to:
- impart financial and investment management knowledge and skills to students to enhance their financial decision making;
- facilitate students to understand and analyze contemporary issues as well as the latest development in the financial world;
- prepare students to sit for the CFA examinations based on the Candidate Body of Knowledge;
- equip students with the latest technologies on Big Data and Artificial Intelligence for financial industry;
- stimulate students to apply financial intelligence to perform investment management.

Applicants shall hold a bachelor’s degree awarded by a recognized institution.
If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:
- an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS;
- a score of 550 or above in the paper-based TOEFL, or a score of 213 in the computer-based TOEFL;
- a score of 80 in the internet-based TOEFL;
- HKALE Use of English at Grade C or above;
- HKDSE Examination English Language at Level 3 or above;
- equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

Remark: Applicants with relevant academic and/or professional qualifications may approach the Programme Team for application of exemption.

HK$7,600 per module (for Module 1-6: Analytical Tools for Investment Management, Financial Management, Debt Investments, Equity and Alternative Investments, Derivative Investments, Portfolio Management ‘course fees are subject to change without prior notice)
Application Fee: HK$150
2867 8476

Postgraduate Certificate in Banking and Corporate Treasury Management
Programme Code: FN043A
Application Code: 1955-FN043A

The target student groups for this programme are financial services practitioners who need to understand treasury from the customer’s perspective and would like to pursue in-depth knowledge of banking and corporate treasury function in global financial markets. Practitioners such as front office dealers, specialists in treasury banking operations, corporate treasury specialists, treasury risk analysts, treasury management product analysts, treasury and pension officers, corporate treasury back office specialists, internal auditors in treasury operations, or consultants are suitable to attend the programme.

TMA will offer the TMA Level 2 (Full Member) membership to graduates who have successfully completed this programme.

HK$7,600 per module
Application Fee: HK$150
2867 8322

Executive Diploma in Merger and Acquisition
Programme Code: EP020A
Application Code: 1935-EP020A

Executive Diploma in Merger and Acquisition provides an overview of the various aspects of M&A transactions and is particularly relevant to professionals who are engaged in corporate strategic planning, finance, business development and giving out legal advice.

Applicants shall hold:
- a bachelor’s degree awarded by a recognized University or equivalent; or
- an Associate Degree / a Higher Diploma or equivalent and have at least 2 years of relevant working experience.

Applicants with other qualification and substantial senior level work experience will be considered on individual merit.

HK$7,000 per programme
Application Fee: HK$150
2867 8476

Executive Diploma in Investment Banking
Programme Code: EP021A
Application Code: 1940-EP021A
2867 8476  cfainde@hkuspace.hku.hk
This programme provides an overview of the various aspects of the investment banking business and is particularly relevant to professionals who are engaged in corporate development and corporate finance functions within a commercial firm.

Applicants shall hold:
a) a bachelor’s degree awarded by a recognized University or equivalent; or
b) an Associate Degree / a Higher Diploma or equivalent, and have at least 2 years of relevant working experience.
Applicants with other qualification and substantial senior level work experience will be considered on individual merit.

HK$7,000 per module
HK$21,000 per programme
Application Fee: HK$3150
6 months  English

Chartered Financial Analyst Level 1 Education Programme
Programme Code: FINA9017
Application Code: 1940-1409NW
2867 8468  cfa@hkuspace.hku.hk
HKU SPACE is pleased to offer the CFA Level 1 Education Programme to help candidates prepare for the forthcoming examination.

HK$11,300
(28 modules)
3 months  English

Executive Diploma in Financial Decision Making
Programme Code: EP023A
Application Code: 1935-EP023A
2867 8476  cfainde@hkuspace.hku.hk
This programme adopts case studies to provide non-financial executives with real life examples on the fundamentals of and practical skillsets in business finance and corporate accounting. This programme consists of four modules: two finance modules and two corporate accounting modules. Students can complete an executive diploma in a minimum of six months.

Applicants shall hold:
a) a bachelor’s degree in the relevant discipline(s) awarded by a recognized university; or
b) relevant and recognized professional qualifications in related business area; and have at least 3 years of work experience in the relevant industry.

HK$31800 per module
Application Fee: HK$3150
8 months  English

Chartered Financial Analyst Level 2 Education Programme
Programme Code: FINA9018
Application Code: 1955-2115NW
2867 8468  cfa@hkuspace.hku.hk
HKU SPACE is pleased to offer the CFA Level 2 Education Programme to help candidates preparing for the forthcoming examinations.

HK$12,400
(28 modules)
4 months  English

Executive Diploma in Sustainable Finance and Investment
Programme Code: EP117A
Application Code: 1935-EP117A
2867 8476  cfainde@hkuspace.hku.hk
The programme aims to give participants a holistic view of the latest development of sustainable finance and investment. The topics cover a wide range of hottest issues in this field from basic sustainable investment to more in-depth social venture capital. As this field is a cross-disciplinary study and still emerging, a practical approach is adopted to outline the mindset change of decision makers with real-life case studies. Students may choose to exit the programme after completing Module 1 for an Executive Certificate award.

HK$8,000 per module
HK$16,000 per programme
Application Fee: HK$3150
5 months  English supplemented with Cantonese

Chartered Financial Analyst Level 3 Education Programme
Programme Code: FINA9292
Application Code: 1935-1143NW
2867 8468  cfa@hkuspace.hku.hk
The programme provides a solid foundation for students to prepare for CFA level 3 examination offered by CFA Institute.

HK$13,000
(28 modules)
4 months  English

Executive Diploma in Investment Banking
Programme Code: EP021A
Application Code: 1940-EP021A
2867 8476  cfainde@hkuspace.hku.hk
This programme provides an overview of the various aspects of the investment banking business and is particularly relevant to professionals who are engaged in corporate development and corporate finance functions within a commercial firm.

Applicants shall hold:
a) a bachelor’s degree awarded by a recognized University or equivalent; or
b) an Associate Degree / a Higher Diploma or equivalent, and have at least 2 years of relevant working experience.
Applicants with other qualification and substantial senior level work experience will be considered on individual merit.

HK$7,000 per module
HK$21,000 per programme
Application Fee: HK$3150
6 months  English

Chartered Financial Analyst Level 1 Education Programme
Programme Code: FINA9017
Application Code: 1940-1409NW
2867 8468  cfa@hkuspace.hku.hk
HKU SPACE is pleased to offer the CFA Level 1 Education Programme to help candidates prepare for the forthcoming examination.

HK$11,300
(28 modules)
3 months  English

Executive Diploma in Financial Decision Making
Programme Code: EP023A
Application Code: 1935-EP023A
2867 8476  cfainde@hkuspace.hku.hk
This programme adopts case studies to provide non-financial executives with real life examples on the fundamentals of and practical skillsets in business finance and corporate accounting. This programme consists of four modules: two finance modules and two corporate accounting modules. Students can complete an executive diploma in a minimum of six months.

Applicants shall hold:
a) a bachelor’s degree in the relevant discipline(s) awarded by a recognized university; or
b) relevant and recognized professional qualifications in related business area; and have at least 3 years of work experience in the relevant industry.

HK$31800 per module
Application Fee: HK$3150
8 months  English

Chartered Financial Analyst Level 2 Education Programme
Programme Code: FINA9018
Application Code: 1955-2115NW
2867 8468  cfa@hkuspace.hku.hk
HKU SPACE is pleased to offer the CFA Level 2 Education Programme to help candidates preparing for the forthcoming examinations.

HK$12,400
(28 modules)
4 months  English

Executive Diploma in Sustainable Finance and Investment
Programme Code: EP117A
Application Code: 1935-EP117A
2867 8476  cfainde@hkuspace.hku.hk
The programme aims to give participants a holistic view of the latest development of sustainable finance and investment. The topics cover a wide range of hottest issues in this field from basic sustainable investment to more in-depth social venture capital. As this field is a cross-disciplinary study and still emerging, a practical approach is adopted to outline the mindset change of decision makers with real-life case studies. Students may choose to exit the programme after completing Module 1 for an Executive Certificate award.

HK$8,000 per module
HK$16,000 per programme
Application Fee: HK$3150
5 months  English supplemented with Cantonese

Chartered Financial Analyst Level 3 Education Programme
Programme Code: FINA9292
Application Code: 1935-1143NW
2867 8468  cfa@hkuspace.hku.hk
The programme provides a solid foundation for students to prepare for CFA level 3 examination offered by CFA Institute.

HK$13,000
(28 modules)
4 months  English

See legend on page 1 & 9 圖像說明於第1及9頁
Minimum Entry Requirements 基本入學要求(P.300)
Fee 學費
Duration 修業期
Exemption 豁免
Short Course 短期課程
For more and latest programme information, please visit our website
有關最新課程資訊及詳情，請瀏覽學院網站 hkuspace.hku.hk
Chartered Financial Analyst Refresher Course - Level 2
Programme Code: FINA9278
Application Code: 1940-1413NW
2867 8468  cfa@hkuspace.hku.hk
This is a 10-hour short course to focus on CFA level 2 exam questions. Students are assumed to have the knowledge required for the CFA syllabus and this course will help them go through different type of questions step-by-step and the relevant tricks required to tackle these questions.
HK$2,500
10 hours
English

Chartered Financial Analyst Refresher Course - Level 3
Programme Code: FINA9324
Application Code: 1955-2117NW
2867 8468  cfa@hkuspace.hku.hk
This is a 10-hour short course to focus on CFA level 3 exam questions. Students are assumed to have the knowledge required for the CFA syllabus and this course will help them go through different type of questions step-by-step and the relevant tricks required to tackle these questions.
HK$2,500
10 hours
English

Executive Certificate in Applied Financial Risk Management
Programme Code: EP157A
Application Code: 1955-EP157A
2867 8476  finedec@hkuspace.hku.hk
This programme aims to provide students with the knowledge of risk management and quantitative analysis using computational tools. It discusses the development of financial markets and investment products for financial risk management. In addition, it covers practical valuation and applications of risk models for financial risk management.
HK$8,500 per programme
10 hours
2 months to 3 months
English

Executive Certificate in Corporate Credit Management
Programme Code: EP075A
Application Code: 1935-EP075A
2867 8476  finedec@hkuspace.hku.hk
Executive Certificate in Corporate Credit Management aims to equip students with current knowledge and practical skills in managing credit risk of corporations. It covers both qualitative and quantitative analysis in corporate credit valuations including case study analysis. This course introduces credit analysis based on Cash Flow Based Lending doctrine which is the shift from the use of accrual based accounting information to the use of cash based financial information for lending decisions.
HK$7,000 per programme
10 hours
3 months
English

Executive Certificate in Investor Relations
Programme Code: EP024A
Application Code: 1935-EP024A
2867 8322  ecerir@hkuspace.hku.hk
The profession of Investor Relations (IR) has developed rapidly in recent years. This programme provides the key concepts and practices in IR with a range of practical tools, applications and research. Topics include regulations, compliance, communications and IR practices. The programme is taught by seasoned IR practitioners. Graduates will obtain a one-year Hong Kong Investor Relations Association (HKIRA) Associate Membership to enhance their network in IR field.
HK$8,500 per programme
4 months
English
**Investment Management**

**Certificate for Module (Examinations Preparatory Programme for Financial Risk Manager (FRM) Part I)**
Programme Code: FN053A

Application Code: 1940-FN053A

This programme provides in-depth coverage of the four topics examined in the Financial Risk Manager (FRM) Part I examination and offers comprehensive examination preparation.

Applicants shall hold a bachelor’s degree awarded by a recognized institution.

If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

- An overall band of 6.0 or above with no subtest lower than 5.5 in the IELTS; or
- a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL; or
- HKALE Use of English at Grade E or above; or
- HKDSE Examination English Language at Level 3 or above; or
- equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

Students are highly encouraged to check with the Global Association of Risk Professionals (GARP) for their eligibility of taking the FRM Part I Examination.

Application Fee: HK$3,150

Duration: 4 months

Level 6 (Reg. No.: 20/000615/L6) Validity Period: 15 Oct 2020 - on-going

**Certificate for Module (Examinations Preparatory Programme for Financial Risk Manager (FRM) Part II)**
Programme Code: FN054A

Application Code: 1940-FN054A

This programme provides in-depth coverage of the four topics examined in the Financial Risk Manager (FRM) Part II examination and offers comprehensive examination preparation.

Applicants shall hold a bachelor’s degree awarded by a recognized institution.

If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

- An overall band of 6.0 or above with no subtest lower than 5.5 in the IELTS; or
- a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL; or
- HKALE Use of English at Grade E or above; or
- HKDSE Examination English Language at Level 3 or above; or
- equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

Students are highly encouraged to check with the Global Association of Risk Professionals (GARP) for their eligibility of taking the FRM Part II Examination.

Application Fee: HK$3,150

Duration: 4 months

Level 6 (Reg. No.: 20/000614/L6) Validity Period: 15 Oct 2020 - on-going

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**AFP Certification Refresher Course**
Programme Code: FINA9293

Application Code: 1890-1144NW

This 10-hours’ short course will help the students go through different type of questions step-by-step and the relevant tricks required to tackle these questions. Students are assumed to have the knowledge required for the AFP syllabus.

Application Code: 1890-1144NW

Duration: 10 hours

Level 6 (Reg. No.: 20/000615/L6) Validity Period: 15 Oct 2020 - on-going

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**Business Investment Decisions for Non-Financial Executives**
Programme Code: FINA9020

Application Code: 1940-1313NW

This module is designed to provide students with an understanding of the methods of business valuation. Topics include: an overview of the financing process, the pros and cons of using financial ratios and interpretations of financial statements, as well as a review of the shortcoming of capital budgeting tools.

Application Code: 1940-1313NW

Duration: 5 weeks

Level 6 (Reg. No.: 20/000614/L6) Validity Period: 15 Oct 2020 - on-going

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**Business Valuation and Financing**
Programme Code: FINA9308

Application Code: 1940-1311NW

This module is tailored for non-financial executives as an introduction to the concepts of financing and investment decisions. Key topics include Introduction to Financial Statement and Ratios, Time Value of Money, Discounted Cash Flow, Valuation of Bonds, Valuation of Stocks, Capital Budgeting, Risk and Return, and Portfolio Theory.

Application Code: 1940-1311NW

Duration: 5 weeks

Level 6 (Reg. No.: 20/000614/L6) Validity Period: 15 Oct 2020 - on-going
本課程除包含股票、外匯、衍生產品及對沖基金的投資理論外，更引用不同實例講解複雜的交易策略，務求以深入淺出的方法讓學員掌握不同市場和利用期貨套期保值、掉期、期權市場、衍生工具交易策略，以及結構產品。

課程內容包括：衍生產品市場概覽、認股證、恒指輪證、牛熊證、期貨、遠期市場和利用期貨套期保值、掉期、期權市場、衍生工具交易策略，以及結構產品。

投資管理

近年金融市場瞬息萬變，環球經濟充斥著很多不穩定因素，投資者要於日趨複雜的投資市場獲利，便須進一步了解各種投資產品，並運用不同的交易策略以增加投資回報及避險。本課程除包含股票、外匯、衍生產品及對沖基金的投資理論外，更引用不同實例講解複雜的交易策略，務求以深入淺出的方法讓學員掌握不同市場和利用期貨套期保值、掉期、期權市場、衍生工具交易策略，以及結構產品。
## Investment Management

### Stock and Investment Techniques Analysis

**Programme Code:** FINA9010

**Application Code:** 1935-1135NW

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<td>HK$1,680</td>
<td>5 weeks</td>
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### Fundamentals of Investment Banking

**Programme Code:** FINA9310

**Application Code:** 1960-1105NW

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### Global Economic Data Analysis

**Programme Code:** FINA9294

**Application Code:** 1940-1390NW

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<td>Cantonese; Textbook in English</td>
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### Foreign Investment Strategies

**Programme Code:** FINA9320

**Application Code:** 1935-1739NW

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<td>Cantonese; Textbook in Chinese</td>
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### Chinese Small Business Financial Management

**Programme Code:** FINA9332

**Application Code:** 1935-1714NW

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<td>5 weeks</td>
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### Forex Investment Guide

**Programme Code:** FINA9300

**Application Code:** 1945-1739NW

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### Vedic Feng Shui in Financial Investment Forecast

**Programme Code:** FINA9288

**Application Code:** 1935-1135NW

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### Hong Kong Statistics in Business Application

**Programme Code:** FINA9286

**Application Code:** 1935-1714NW

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See legend on page 1 & 9 看圖說明於第1及第9頁

Minimum Entry Requirements 基本入學要求 (P.300) Fee 學費 Duration 修業期 Medium of Instruction 教學語言 Qualifications Framework 資歷架構 Exemption 豁免 Short Course 短期課程

For more and latest programme information, please visit our website 有關最新課程資訊及詳情 - 請瀏覽學院網站 hkuspace.hku.hk
This is an exempted course under the Non-Local Higher and Professional Education (Regulation) Ordinance. It is a matter of discretion for individual employers to recognize any qualification to which this course may lead.

The course operator is applying for exemption under the Non-local Higher and Professional Education (Regulation) Ordinance. It is a matter of discretion for individual employers to recognize any qualification to which this course may lead.

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The course operator is applying for exemption under the Non-local Higher and Professional Education (Regulation) Ordinance. It is a matter of discretion for individual employers to recognize any qualification to which this course may lead.

It is a matter of discretion for individual employers to recognize any qualification to which this course may lead.
Performance Management and Internal Controls
Programme Code: ACCT9022

Application Code: 1955-1963NW
2867 8476
fineac@hkuspace.hku.hk

This module is tailored for non-financial executives as an introduction to the concepts of cost analysis for management decisions. Topics include budget for control, standard costing and variance analysis using flexible budgets for material, labour and overhead, sales analysis using quantity, mix and value analysis.

Applicants shall hold:
- a bachelor’s degree awarded by a recognized University or equivalent; or
- an Associate Degree / a Higher Diploma or equivalent, and have at least 2 years of work experience; or
- a recognized professional qualification.

Applicants with other qualifications and substantial senior level work experience will be considered on individual merits.

HK$4,500 per module
Application Fee: Free
4 weeks
English
This is an exempted course under the Non-Local Higher and Professional Education (Regulation) Ordinance. It is a matter of discretion for individual employers to recognize any qualification to which this course may lead. It is a matter of discretion for individual employers to recognize any qualification to which this course may lead. It is a matter of discretion for individual employers to recognize any qualification to which this course may lead.