



INVESTMENT MANAGEMENT
ASSOCIATION OF SINGAPORE

An Introduction to the GIPS 2020 Standards

Programme Prospectus

Global Investment Performance Standards (GIPS)

The GIPS Standards are ethical standards for calculating and presenting investment performance based on the principles of fair representation and full disclosure. They are voluntary industry standards that provide transparency and global comparability in a world where regulations and market practices differ significantly from jurisdiction to jurisdiction.

IMAS is the Singapore Country Sponsor for the GIPS Standards, and we are responsible for promoting and furthering the progress of the GIPS standards in Singapore. IMAS strongly encourages all its members to comply with the GIPS standards and perform verification.

The GIPS standards are developed, maintained, and promoted through the collaboration of individual volunteers from the investment community, CFA Institute, and GIPS Standards Sponsors in over 40 markets.



Programme Structure

This e-Learning module is 1-hour long.

The training module covers topics that are identified to be relevant to fund management professionals and will include case studies to facilitate learning.

Learning Outcomes

By completing this programme, participants will be able to:

- Understand the key principles underlying the GIPS Standards
- Explore illustrative examples of the GIPS Standards
- Understand the key differences between the 2020 and 2010 GIPS Standards
- Understand the benefits of compliance and verification



Course Outline

1. Introduction to the 2020 GIPS Standards
2. Objectives of the GIPS Standards
3. Key Principles of the GIPS Standards
 - Firm definition
 - Portfolios
 - Composites
 - GIPS Reports
 - Returns
 - Input Data & Calculation Methodology
 - GIPS Advertising Guidelines
4. Other Changes in the GIPS 2020 Standards
 - New Sections for Asset Owners and Verifiers
 - Investment Track Record Portability
 - Carve-Outs and Allocated Cash
 - External Valuations
5. Compliance
6. Verification
7. Common Challenges
8. Best Practices & Practical Tips



FTS - Eligible

This programme is recognised under the Financial Training Scheme (FTS) and is eligible for FTS claims subject to all eligibility criteria being met.

Please note that in no way does this represent an endorsement of the quality of the training provider and programme. Participants are advised to assess the suitability of the programme and its relevance to participants' business activities or job roles.

The FTS is available to eligible entities based on the prevalent funding eligibility, quantum and caps. FTS claims may only be made for recognised programmes with specified validity period. Please refer to www.ibf.org.sg for more information.
