Faysal Aziz

Financial Simulation for Non-Finance Managers

Market-data interpretation and paper-trading exercises

FA-0616 · 2 days

Data & Analytics

Practise interpreting market data and trading indicators in simulations, with a clear distinction between hypothetical results and live trading.

Introduction

This two-day course introduces non-finance managers to financial-market information through paper-trading exercises. Participants examine price charts, selected indicators, trade assumptions and portfolio scenarios across traditional instruments and cryptocurrency examples.

All activities are educational simulations with no real-money trading. Paper trading can show how a process works but does not reproduce execution, liquidity, costs or behavioural pressures reliably. Technical indicators and simulated returns do not establish future performance or investment suitability.

Learning outcomes

The course teaches participants to:

- Describe common financial instruments and the purpose and limitations of paper trading.
- Interpret sample charts and calculate or review selected moving averages and indicators.
- Compare simulated trade decisions using documented assumptions and risk/reward measures.
- Explain basic cryptocurrency terminology and recognise volatility and platform risks.
- Construct an illustrative diversified paper portfolio and discuss its limitations.
- Communicate an analysis, its assumptions and uncertainty without presenting it as an investment recommendation.

Prerequisites

- Basic understanding of business operations.
- Familiarity with Microsoft Excel or equivalent spreadsheet software.
- No prior financial or trading knowledge is required.

Use a suitable training simulator or prepared demonstration account. Do not fund a live trading account or use organisational/customer financial records for the exercises.

Training outline

1. Day 1 — Markets, Paper Trading and Basic Analysis

Orientation

- Orientation and expectations
- How market information can inform financial discussions; recognise where specialist advice is needed.

Financial Instruments

- Equities, bonds, commodities, and forex
- Simulation: Basic paper trading of various financial instruments

Paper-Trading Workflow

- Benefits of paper trading for learning and strategy development
- Set up a paper-trading workflow and record hypothetical trades without deposits or real-money transactions.

Charts and Patterns

- Understanding price charts, trends, and patterns
- Identify example chart patterns, record a hypothetical decision and discuss why a pattern may fail.

Moving Averages and Indicators

- Types of moving averages: Simple, Exponential, Weighted
- Other indicators like RSI, MACD

- Compare selected moving averages and RSI/MACD in a simulated strategy; avoid treating indicator signals as reliable forecasts.

2. Day 2 — Additional Indicators, Crypto and Risk

Further Technical-Analysis Examples

- Introductory examples of Fibonacci retracements, Bollinger Bands and Ichimoku charts, including their assumptions and limitations.
- Guided comparison of selected additional indicators rather than mastery of advanced trading strategies.

Cryptocurrency Concepts

- Understanding Bitcoin, Ethereum, and Altcoins
- High-level blockchain context and cryptocurrency-market risks; technology does not establish investment value or safety.
- Simulate cryptocurrency-market decisions using a prepared dataset or training environment, with no real-asset purchase.

Risk and Trade Assumptions

- Stop-loss and take-profit concepts, risk/reward assumptions and the possibility of execution differences in real markets.
- Document hypothetical position and loss assumptions; compare outcomes without claiming the strategy controls all risks.

Portfolio Scenarios

- Concepts of asset allocation and diversification
- Create an illustrative paper portfolio and discuss correlation, concentration and why diversification does not remove market risk.

Review and Evaluation

- Summary of key learnings
- Post-course evaluation for measuring skill development
- Recommendations for further education and simulated trading practice

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