Towards the 5th Decade of Sustainable Wealth for Thais
Innovations in Investor Education Programs and Delivery Strategies

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Topics

1. An Overview of Investor Education: Thailand Case
2. Content Development & Innovations
3. Innovations in Knowledge Distribution & Activities
An Overview of Investor Education:

Thailand Case
Capital Market Education Framework in Thailand

Support an expansion of supply and demand sides of capital market

A Classification of Capital Market Education

- **General Public Education** for youth, adults and general public

- **Investor education** for potential and existing investors

- **Professional education** for professionals in brokerage business and financial intermediaries

- **Executive education** for future policy makers and leaders
Organization Structure

Exchange Function

CMDF Function
- Sustainable Development
- Capital Market Research Institute
- Capital Market Education

CMA
Capital Market Academy
Executive Education

Professional Education

TSI
Thailand Securities Institute
Investor Education

Public Education

Books
The Structure of Investor Education

Potential Investors
- New & Sophisticated Investors
  - Stocks / Derivatives / Funds
- PVD's Member Depositors
- University Students
- First Jobbers

General Public
- School Students
- Thai Citizens

Knowledgeable Investor Base
- Content & Tools Development
  - Course materials
  - Online tools
  - Teaching tutorials
  - Trainers skills and product knowledge

Dissemination Channels
- Training & Activities
- Website & online media
- Publication
- Mass Media
- Learning Center

Intermediate & Advanced investment knowledge
Wealth management & Fundamental of investment
Personal Finance
“Education in the digital era”

**Innovations**
- IT: Website & Social Media
- Mass Media & Activities
- Outlet

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**TSI’s Investor Education Innovation Model**

Content Development

Knowledge Distribution & Activities
TSI’s Investor Education Content Packages

**Wealth Management**
- Financial Planning
- Consumption Planning
- Tax Planning
- Insurance Planning
- Retirement Planning
- Wealth Society

**Equity**
- Fundamental Investment
- Investing in Equity
- Basic Fundamental Analysis
- Basic Financial Statement Analysis
- How to Scan Financial Statement
- Fundamental of Technical Analysis
- How to Invest by Fundamental and Technical Analysis
- Portfolio Management
- Internet Trading on Equity

**Derivatives**
- Investing in Derivatives
- Internet Trading on Derivatives
- Knowing Derivatives Products
- Knowing SET50 Futures, Single Stock Futures and Sector Futures
- Knowing Gold Futures and Silver Futures
- Knowing Oil Futures
- Knowing USD Futures
- Knowing SET50 Options

**ETFs**
- Investing in ETFs

**Mutual Fund**
- Investing in Mutual Funds
- Tax Planning with LTF & RMF

**Bond**
- Investing in Bond

**TurnPro 1**
- Fundamental Analysis
  - Financial Analysis
  - Financial Statement Analysis 1: Theory
  - Financial Statement Analysis 2: Workshop
  - Stock Valuation
  - Portfolio Management

**TurnPro 2**
- Sector Analysis
  - Banking
  - Energy & Utilities
  - Property Development
  - Information & Communication Technology
  - Services
  - Agro & Food Industry
  - Commerce

**TurnPro 3**
- Technical Analysis
  - Technical Analysis 1: Theory
  - Technical Analysis 2: Indicators
  - Technical Analysis 3: Oscillators
  - Technical Analysis 4: Workshop

**Intermediate Derivatives**
- TFEX Challenge Academy

**Practical Knowledge**
Learning Approaches: Traditional

- **Physical Publications**
- **Classroom**
- **Articles**
- **Course Material Presentations**
Learning Approaches: Innovative

Online Seminar
Financial Clip
e-Learning
Online Article
Online Document
Financial Tool
Innovations in
Knowledge Distribution & Activities
IT: Online and Social Media
SET Education Website

2001 www.tsi-thailand.org

April 2015 www.set.or.th/education

Online Seminar
Financial Clip
e-Learning
Online Article
Online Document
Financial Tool

Member log-in required
Member log-in required
An Example of Online Seminar

Equity course for beginners: Fundamental Investment

By Dr. Kittipat Santaweesuk, Lecturer, Naraesuan University
An Example of Financial Clips

Investor’s Practice Guide

How to Find Your Good Stocks
By Therdsak Thaveeteeratham
Executive Vice President,
Asia Plus Securities Public Company Limited
Examples of Financial Tools

Money Tools

Investment Tools
SET e-Book

PRODUCTS: (Grouped by clients): 114 titles

- Sustainable Development
- Professional
- Investor
- General Public

DISTRIBUTION

- Physical Book: 114 titles
- e-Book for sell: 54 titles
- e-Book for free download: 59 titles
SET Education Online Media Revolution

TSI Website on Mobile
- TSI on Youtube Channel (youtube.com/tsithailand)
- TSI Facebook (facebook.com/TSIClub)

TSI Website Revision
- TSI Website Revision
- TSI e-Learning

TSI Online Seminar Sign Language for Deaf

SET e-Book Application

TSI Website Revision

Source: http://truehits.net

Page Views (million)

Year


0.66 1.85 2.33 2.84 5.60 6.92 5.01 5.39 7.06 10.66 9.69

Hello World!
Mass Media & Activities
Mass Media & Activities

- **TV Programs:** “Investor’s classroom”, “365 Days of Investment”
- **Article in Newspaper & Magazines**
- **Radio Spot**
- **Out of Home Media:** sky train ad., subway ad.
- **Viral Clip**
- **Media by Influencers:** Music Video, Interview
- **Activities:** booth, troop
An Example of TV Programs

Investment School Season 2

By Dr. Krisada Sektrakul, CFP®

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ดร.ภูชนก เสกสรรุปลคร, CFP®
ผู้ช่วยกรรมการผู้อำนวยการศูนย์ส่งเสริมการพัฒนาความรู้ตลาดทุนตลาดหลักทรัพย์แห่งประเทศไทย
Examples of Viral Clips

Financial Planning Clips
Viral Clip
An Example of Media by Influencers

Financial Planning Music Video

www.YouTube.com/SETGroupOfficial

https://www.youtube.com/watch?v=mY7T0A3id4I
Media by Influencers
Education Outlet: Maruey Library

The Best Capital Market Knowledge Library in Thailand

80% Capital Market Knowledge + 20% Others

Maruey Website www.maruey.com | Maruey eLibrary

- Search Library Resources
- Renew / Hold Resources
- Download - Read eBook
- Follow Article and Book Recommend
Education Outlet: Maruey @U-Net & SET Corners

Maruey Library @Siam University Branch

SET Corners
Education Outlet: SET Investment Center (SET IC)

- A modern investment center in collaboration with 7 regional universities
- Provide investment knowledge and securities market information through medias, activities, etc.

Activities
- Activity for students: SET Young Gen
- SET on Tour
- Activity with brokers

7,500 participants in 2014
Next Moves: Integrative Innovations

Innovation Developments

SET Digital Education Hub

Digital Investment School

SET Investment Discovery

Musuem: SET Investory

Grand Opening 2016

Season 3:
on air October 2015

April 2015
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