



ZISHI™

Resilience
Through
Knowledge

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Welcome to ZISHI

Committed to unlocking success for your business, we have been empowering our clients to build **resilience through knowledge** for over 25 years.

A recognised global leader, we stand as the preferred and trusted training and education partner for a number of the world's most prestigious financial institutions.

Our cutting-edge, immersive learning experiences support the breadth of the financial industry, from some of the largest asset management firms and global trading exchanges to world-leading universities, sovereign

wealth funds, energy companies, refiners, and investment, commercial and central banks.

Spanning all levels of trading qualifications, the maze of regulatory and compliance training and financial services professional development, ZISHI's expertise is unrivalled.

Our internal faculty of leading trainer-practitioners sets us apart. Delivering solutions uniquely crafted to bridge your business's knowledge gap, our wealth of educator experience and hands-on industry insight ensures your teams receive practical, up-to-date, and contextually relevant training.

Whether one-to-one or multi-faceted group deliveries, entry level or boardroom executives, and from design through to delivery, ZISHI is uniquely placed to become your trusted training partner, developing programmes and learning pathways to meet your specific operational needs.

Enabling informed decision-making and contributing to financial stability and wealth creation, we build **resilience through knowledge** across your business.

Powerful Learning Solutions

At ZISHI, we firmly believe that the transformative power of new technologies will reshape the landscape of professional learning.

We are proud pioneers in the realm of digital learning creation.

Our dedicated in-house team of experts is here to revolutionise your learning experiences, tailored precisely to your requirements and objectives.



Our unique experience

Bespoke Content Creation

Looking for tailor-made learning solutions? We specialise in crafting personalised content that aligns seamlessly with your organisation's objectives.

Real-World Simulator-Based Learning

Take the learning experience to the next level with immersive, hands-on experiences that bridge the gap between theory and practice.



Curated Learning Journeys

For clients seeking comprehensive ongoing learning pathways, our digital learning team possesses the expertise and knowledge to support your long-term ambitions.

Rapid Deployment

Need to quickly roll out bite-sized, focused learning modules? We've got you covered with swift and effective solutions.

Digitising Existing Content

We excel at transforming your traditional learning materials into dynamic, interactive digital formats, breathing new life into your educational resources.

Financial Markets, Financial Products & Trading

With financial markets and trading at our core, and a teaching faculty of expert practitioners, no one is better placed to deliver the knowledge and skills your organisation needs to build resilience and deliver on your key performance goals.

At ZISHI, we specialise in providing comprehensive educational programmes that cater to professionals working across various sectors including financial exchanges, brokers, trading firms, banks, refiners, and producers.

We are dedicated to equipping you for success in the fast-paced world of trading and financial markets.



Example courses

- ✓ Charting & Technical Analysis
- ✓ Commodity Markets & Commodity Derivatives
- ✓ Introduction to Fixed Income Futures
- ✓ Introduction to Spread Trading
- ✓ Options Volatility Trading Masterclasses
- ✓ Pricing, Hedging & Trading Options
- ✓ Trading Fixed Income Derivatives

...and many more

From those who are new to the industry to seasoned C-suite executives looking to enhance their skill set, ZISHI offers a range of dynamic programmes that include real time simulations and elements of gamification, utilising our own technology platforms and the most recognised within the industry. This interactive approach ensures that learning is both engaging and applicable with the current trends and demands of the global market.

We are building industry resilience through knowledge, and are committed to being your trusted destination for financial markets education, offering a learning experience that is both enriching and rooted in real-world applications.



Risk Management, Audit & Operations



Our expertise within the Risk Management, Audit and Operations functions is without rival. We regularly deploy some of the industry's most preeminent educators to help solve our clients' critical challenges.

World-leading banks rely on our cutting-edge training to ensure their risk management teams are equipped to deal with whatever challenges the markets present to them.

Whether starting out in your risk management career or a seasoned professional wanting to develop your technical expertise to new levels, our portfolio of courses will equip you with the tools and knowledge to effectively manage risks and enhance operational efficiency.

ZISHI provide risk-related functions, such as audit and operations, with highly curated training that meet your business's specific requirements.

Example courses

- ✓ Asset & Liability Management
- ✓ Climate Finance Risk
- ✓ Credit Risk Management
- ✓ Effective Banking Operations
- ✓ Effective Internal Audit
- ✓ Fundamentals of Financial Risk
- ✓ Market Risk Management
- ✓ Operational Risk Management

...and many more

We help teams attain the required knowledge to realise operational excellence whilst being an important line of defence in an overall risk framework. A wide range of clients and case studies support our pedigree in delivering both credit and market risk solutions.

In addition, our team of consultants support audit functions to gain new skills and knowledge prior to conducting annual audit strategy.



Credit & Corporate Banking

Embark on a transformative learning journey with cutting-edge training. Delivered by practitioners and leading experts, you can be sure your operation has the latest thinking and practical insights covering the spectrum of corporate credit and corporate banking topics.

Our expertise spans traditional credit and corporate banking training, covering topics such as early warning signals, debt restructuring, problem loan management, cash flow analysis and forecasting through to credit committee presentations and report writing skills.



Example courses

- ✓ Bank Credit Analysis
- ✓ Cashflow Analysis
- ✓ Corporate Credit Analysis
- ✓ Corporate Debt Restructuring
- ✓ Credit Portfolio Risk Management
- ✓ Early Warning Signals
- ✓ ESG Risk Assessment for Lenders
- ✓ Working Capital Management

...and many more



ZISHI's courses will help you navigate the complexities of corporate credit, where you will gain the skills needed to assess risk, analyse financial statements and make informed lending decisions.

In the area of corporate banking, ZISHI will hone relationship management techniques, financial product offerings and the ever-evolving landscape of global finance.

Our ability to seamlessly bridge theory with real-world applications will enable you to thrive in this dynamic financial sector.



Corporate Finance, Project Finance & Development Finance



Our comprehensive suite of courses delve deep into the realms of corporate finance, project finance & development finance.

Whether you are at the early stages of your career or a seasoned professional looking to elevate your expertise, our courses are meticulously crafted to equip you with the skills, knowledge and practical applications in order to succeed in an evolving global marketplace.

In the project finance arena, we support clients with learning on Infrastructure project finance, power project finance, PPA's, project modelling and restructuring.



Example courses

- ✓ Asset Securitisation
- ✓ Corporate Valuation Techniques
- ✓ ESG in Project Finance
- ✓ Financial Modelling
- ✓ Infrastructure Project Finance
- ✓ International Trade Finance
- ✓ Leveraged Finance
- ✓ Mergers & Acquisitions

...and many more

Our experience in working with corporate finance teams around the world means we are regularly delivering programmes on corporate valuation, leverage buyouts, structured finance, due diligence, asset securitisation and debt restructuring.

Our unique blend of theory and real-world applications, delivered by highly experienced practitioners and expert trainers, allows you to implement your learning immediately.



Fintech, AI & Data Science

Financial innovation starts here. Immerse yourself in the cutting-edge world of fintech, AI, and data science with our transformative training programmes.

We are passionate about equipping you with the skills needed to navigate the intersection of finance and technology.

True to ZISHI's exacting standards and renowned proficiency, courses are meticulously designed to help you demystify fintech trends, understand the power of artificial intelligence and empower you to harness the potential of data science.



Example courses

- ✓ AI in Financial Services
- ✓ Blockchain in Banking
- ✓ Crypto-Assets & Tokenisation
- ✓ Data Science in Banking & Investment
- ✓ Data Visualisation
- ✓ Digital Assets
- ✓ Fintech Governance & Regulation
- ✓ Machine Learning in Banking & Finance

...and many more

Key areas of focus include, blockchain and digital assets, data science and visualisation, machine learning and artificial intelligence, NLP and related regulatory concepts.

We seamlessly weave these intricate topics together to give you a comprehensive understanding of how they shape the future financial landscape.



ESG & Sustainable Finance

Amongst the first to identify a tangible shift within the financial and corporate worlds, ZISHI is positioned at the forefront for learning interventions around Environmental, Social and Governance (ESG) and sustainability themes.

Climate change, local and international government regulations and much more are increasing ESG and sustainability requirements for the financial services sector at a rate of knots. Driven by regulations, but, unquestionably, too by stakeholder and end user demand for ethical operations and accountability.

Equipped with awareness, media coverage and readily available reporting data, your stakeholders – and their stakeholders – will be selective with their investment. It is paramount for the medium- to long-term viability of every financial services business to be operating within, and beyond, regulated parameters.



That is where ZISHI steps in.

Our courses are carefully designed to empower you with a deep understanding of ESG principles, sustainable investment strategies, and the tools to make informed decisions that prioritise both profit and planet.

Serving both buy and sell side, our innovative portfolio of programmes offer a pathway to a world where financial success and environmental, social and ethical responsibility go hand in hand.

We are committed to equipping you with the knowledge and skills needed to understand the complexities of this increasingly vital sector.

Our breadth of knowledge and wealth of expertise is best placed to ensure you don't just meet what is expected of you, but you achieve beyond it.

Perfectly positioned at the intersection of ESG investing, sustainable finance and corporate sustainability, ZISHI's experts offer comprehensive and compelling training for the buy-side and sell-side of the financial sector.

Example courses

- ✓ Climate Finance Risk Analysis
- ✓ Developing an ESG Strategy
- ✓ ESG Analysis & Assessment
- ✓ Fundamentals of Biodiversity & Natural Capital
- ✓ Green Capital Market Products
- ✓ Green Listings & Capital Raisings
- ✓ Introduction to ESG in Financial Services
- ✓ Sustainable Investment

...and many more



Investment & Wealth Management

The ZISHI team possess an extensive depth of knowledge within the Investment and Wealth Management sectors, supporting global clients with a wide array of training designed to increase skills, knowledge and client returns.

So, if your private bankers need help in understanding Inheritance Tax (IHT) or your financial planners or investment managers require development in their consultative selling skills we have the tried and tested programmes that will help guarantee your success.



Example courses

As with all our programmes, everything we do is tailored to focus on your specific business needs and requirements, thus ensuring everything you learn can be applied, having an immediate impact on your business.

- ✓ Asset Allocation
- ✓ Dynamic Portfolio Management
- ✓ ESG for Investment Managers
- ✓ Performance Measurement
- ✓ Portfolio Optimisation
- ✓ Private Capital Investment
- ✓ Relationship Management
- ✓ Sustainable Investment Techniques

...and many more

Example courses

As a Premier Accredited Training Provider with the CISI, all our training workshops and courses are CPD accredited and, with the Chartered Wealth Management Level 7 qualification leading the way, our qualification results are consistently above national average.

We advocate small class numbers with highly experienced and knowledgeable training consultants (ex-practitioners) delivering the sessions.

Learn with market leaders, recognised for achieving consistently above national averages for CISI qualification results, ZISHI is a CISI Premier Training Partner.



- ✓ Chartered Wealth Manager
- ✓ Investment Advice Diploma
- ✓ Investment Operations Certificate

Regulation, Governance & Compliance



Crypto, AI and emerging power markets are just some examples of the new technologies and sectors applying additional regulatory and compliance demands on the already highly-regulated finance space, and there are no signs of this abating.

Designed and led by specialist trainer practitioners, our range of focussed programmes deliver the information your teams need to operate with confidence within those demands.

Taking a holistic view of your organisation and bringing decades of expertise directly to your firm, our consultants offer a wealth of knowledge, guidance and practical steps to ensure operational compliance.

As practitioners, they are uniquely equipped to disseminate to your teams with clarity and provide direct actions, eliminating the burden and demand on internal resource. And if you haven't the internal capacity to assess your team's competence, especially those that are certified, we have extensive experience of this too, along with a 100% success rate in preparing your senior people for regulatory interview.

Example courses

- ✓ Preparing for Regulator Supervisory Visits & Interviews
- ✓ Introduction to Investment Management
- ✓ Organisational Culture & Behavioural Risks
- ✓ Crypto Currency & Digital Asset Compliance
- ✓ Managing the Risk of Outsourcing in FS
- ✓ Understanding Cybercrime
- ✓ Effective Minute Taking
- ✓ Managing the Risk of AI in Financial Crime

...and many more



Professional Development

We understand that the key to success in today's financial markets lies not only in technical expertise but also in your personal and professional growth.

Our comprehensive range of courses span the spectrum of professional development from essential skills such as leadership, communication and report writing to presentation and negotiation skills and beyond.

We pride ourselves on our commitment to supporting and securing a resilient workforce, transforming the potential of those at every level within the sector. Whether out-of-the-box or a tailored solution, our courses provide participants with the tools and knowledge needed to excel.



Example courses

- ✓ Advanced Negotiation Skills
- ✓ Design Thinking
- ✓ Effective Hybrid Collaboration
- ✓ Effective Presentation Skills
- ✓ Fundamentals of Innovation
- ✓ High Impact Communication Skills
- ✓ Managing & Leading High-Performance Teams
- ✓ Resilience Under Pressure

...and many more



University Accredited Programmes

As a recognised leading global trading practitioner and educator, we have written, designed and deliver accredited, regulated financial derivatives trading qualifications ranging from Level 2 to Level 7.

Our fully immersive programmes have been adopted by some of the UK's leading universities as summer enrichment programmes and credit bearing modules within both undergraduate degrees and postgraduate masters finance courses.

Designed with purpose, we provide the highest level of experiential learning akin to an internship and mirroring the intensity of a junior trader graduate development programme.

Moulding the next generation of market participants, we support development of industry relevant 'Knowledge, Skills & Behaviours' to create work-ready, professionally competent individuals.



Courses

- ✓ Level 7 Diploma in Applied Financial Trading
- ✓ Level 5 Advanced Diploma in Financial Trading
- ✓ Level 5 Advanced Diploma in Options Trading
- ✓ Level 5 Advanced Diploma in Financial Trading (post CISI Level 4 Investment Advice Diploma qualification)
- ✓ Level 3 Diploma in Financial Trading
- ✓ Level 2 Certificate in Financial Trading

With a heavy emphasis on practical application, our students gain exposure to real-time market pricing across diverse asset classes and products. They have the opportunity to execute trades and implement strategies using cutting-edge industry tier-1 front-end trading systems, all within a secure, simulated environment.

In addition, our higher-level programmes are externally recognised at 'Associate membership' level by the Chartered Institute for Securities & Investment (CISI), one of the world's leading professional bodies for finance and investment. Upon membership students can use the designated letters 'ACSI' demonstrating industry professional standing.



Graduate & Early Careers

Elevate your talent pool and fuel the future of the industry with our innovative graduate and early careers programmes, tailor-made to meet the evolving demands of your business and the sector at large. Cultivating the leaders of tomorrow begins with strategic investment today.

Our programmes go beyond traditional learning, offering dynamic and engaging experiences that equip your budding professionals with the skills, knowledge and resilience required in today's ever changing financial landscape.



It is well documented that professional development supports staff retention. Investing in entry-level candidates with the right programme and demonstrating commitment to their career progression will ensure you realise your investment and retain your talent pool of resilient, rising stars.

Having curated significant numbers of programmes for multiple industry-leading firms, our consultants will bring their decades of experience to you should you require support mapping and optimising your business' unique learning journey; working as your trusted advisor, crafting a tailor-made solution that maximises the potential of the programme.



Online Executive Education

Removing the barriers of location and time, in partnership with world leading universities our portfolio of online executive education programmes allows you to study at a time, pace and place that works for you from anywhere around the world.

As both proficient educators and experienced practitioners, our faculty's rare proximity to the market means they deliver the latest, most relevant information, case studies and more. Blending this with cutting edge technology ensures you benefit from expertly curated content with real-world application and a fully supported, immersive learning experience.



Example courses

- ✓ Executive Certificate in Blockchain & Digital Assets
- ✓ Executive Certificate in Corporate Valuation
- ✓ Executive Certificate in Credit Risk Analysis
- ✓ Executive Certificate in ESG & Sustainability in Finance
- ✓ Executive Certificate in Future of Power Markets
- ✓ Executive Certificate in Global Financial Markets
- ✓ Executive Certificate in Project Finance
- ✓ Executive Certificate in Wealth Management

...and many more



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