RO2 LEARNING OUTCOME 6

Chapter 8- Other Indirect investments including Life assurance –based products (Learning outcome 6)

STRUCTURED PRODUCTS

- 100% capital protection
- Partial capital protection
- No protection

TYPES OF ISA

- Cash ISA
- Stocks and Shares ISA
- Innovative finance ISA
- Lifetime ISA

HEDGE FUND STRATEGY

- Long/ Short funds
- Relative value funds
- Event-drive funds

EXCHANGE-TRADED PRODUCTS

- Exchange-traded funds (ETFs)
- Exchange-traded commodities
- Exchange-traded notes (ETNs)

FRIENDLY SOCIETY POLICIES

- Tax treatment
- Investment choice
- Investment limits
- Investor protection
- Regular savings plans
- Lump sum investments

MAIN TYPES OF LUMP SUM LIFE ASSURANCE BONDS

- Guaranteed income bond
- High income bond
- Guaranteed growth bond
- Unit-linked bond
- Distribution bond
- Guaranteed protected equity bond
- With-profit bond

PROPERTY-BASED INVESTMENTS

- Shares in listed property companies
- Property unit trusts and investment trusts
- Offshore property companies
- Real estate investment trust (REITs)

CHOICE OF INVESTMENT FUNDS

- Cash funds
- Building society funds
- Gilt or fixed-interest funds
- Index-linked gilt funds
- Equity funds
- International funds
- Property funds
- North America funds
- Far eastern funds
- Managed funds
- Ethical funds
- External manager funds
- Manger of manger funds

LIFE ASSURANCE CONTRACTS

- Protection only
- Protection and an investment element