

Guide Complet sur les Examens d'Investissement

Introduction

Les **examens d'investissement** sont cruciaux pour quiconque cherche à améliorer ses connaissances dans le domaine financier. Que vous soyez un étudiant ou un investisseur débutant, comprendre des concepts comme les *fonds d'investissement*, les *cours d'investissement*, et la *gestion de portefeuille* vous aidera à naviguer dans les marchés financiers.

1. Fonds d'investissement

Les **fonds d'investissement** regroupent l'argent de plusieurs investisseurs pour acheter des actions, des obligations ou d'autres actifs. Ils permettent une **diversification facile**. Avant de choisir un fonds, renseignez-vous sur sa performance passée et ses frais. Pour en savoir plus, consultez cet [article utile](#).

2. Cours d'investissement

Les **cours d'investissement** sont essentiels pour évaluer votre performance. Suivez les fluctuations des prix des actifs. Un bon investisseur sait quand acheter et quand vendre en fonction des *cours* du marché.

3. Gestion de portefeuille

La **gestion de portefeuille** implique la sélection d'un mélange d'investissements pour atteindre vos objectifs financiers. **Diversifiez vos actifs** pour limiter les risques. Un portefeuille équilibré peut inclure des actions, des obligations et d'autres actifs.

4. Analyse financière

L'**analyse financière** est un outil essentiel pour évaluer vos choix d'investissement. Examinez les états financiers des entreprises dans lesquelles vous envisagez d'investir. Cela vous aidera à comprendre leur **santé financière**.

5. Stratégies d'investissement

Il existe plusieurs **stratégies d'investissement**, y compris l'*investissement à long terme*, le *day trading*, et l'*investissement valeur*. Identifiez la stratégie qui correspond à votre profil de risque et à votre horizon temporel.

6. Marchés financiers

Les **marchés financiers** sont des plateformes où s'échangent des actifs financiers. Restez informé des tendances actuelles pour prendre des **décisions éclairées**. Les *fluctuations des marchés* influencent souvent le sentiment des investisseurs. Vous trouverez plus d'informations en consultant ce [lien utile](#).

Conclusion

Maîtriser ces **concepts** vous mettra sur la voie de l'investissement réussi. Continuez à vous éduquer, à pratiquer et à surveiller votre progression. L'**apprentissage continu** est la clé pour devenir un investisseur avisé.

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Question: 1

Xian-Li believes she is a sophisticated investor. She has constructed her own portfolio and has had some success. She does not believe in studying a company's details such as earnings, expenses, or assets. She is more concerned with patterns in a company's stock price over time. She believes patterns form and can be used to predict future movements in the market.

How does Xian-Li evaluate the companies in her portfolio?

- A. fundamental analysis
- B. flowchart analysis
- C. technical analysis
- D. value analysis

Answer: C

Question: 2

Yesterday, Mariana purchased mutual funds for the first time from Diablo, who is a Dealing Representative for Horizon Financial. When Mariana mentions to her friend Marcus that she just started to invest, Marcus confides that he experienced losses from mutual fund investing. Her initial feelings of excitement have now changed to worry and regret. She wished she had talked to her friend before investing and wonders if she can change her mind.

Which statement regarding the right of withdrawal applies?

- A. The right of withdrawal is based on the securities act legislation within the jurisdiction the purchase occurred.
- B. Before Mariana can cancel her order, she must wait two business days to pass before she can cancel her order.

- C. How the right of withdrawal can be applied is determined by the Mutual Fund Dealers Association of Canada's conduct rules.
- D. The Canadian Securities Administrators have instituted national instruments regarding Mariana's right to cancel her order.

Answer: A

Question: 3

Iliana owns 1,000 participating preferred shares in the First Canadian Bank. Which of the following features are characteristic of her investment?

- A. Iliana has the right to purchase more preferred shares in the company before common shareholders.
- B. Iliana is able to vote at the annual general meeting and elect members of the board of directors.
- C. Iliana can convert her preferred shares to common shares at a fixed price and within a specified time period.
- D. Iliana has a right to share in the bank's net profits over and above the specified dividend rate.

Answer: D

Question: 4

Wilma has always used the services of a tax preparation firm to file her taxes but is skeptical that she has really benefitted. This year she plans to file her own taxes for the first time.

What would be useful for her to know?

- A. Wilma's marginal tax rate may be lowered when tax deductions are applied to her total income.
- B. Wilma's top marginal tax rate will be applied to every taxable dollar when her tax return is filed.
- C. Wilma's tax deductions permit her to reduce her tax payable dollar-for-dollar.
- D. Wilma's non-refundable tax credits may only reduce her taxable income dollar-for-dollar.

Answer: A

Question: 5

One of your clients, Fernando, is approaching 71 years of age and has a few questions regarding life income funds (LIFs).

Which of the following statements about LIFs is TRUE?

- A. Fernando may make contributions to his LIF if he continues working.
- B. Fernando is free to withdraw any amount from his LIF above the minimum amount.
- C. Fernando can transfer money from his registered retirement savings plan (RRSP) to a LIF.
- D. Fernando can transfer money from his locked-in retirement account (LIRA) to a LIF.

Answer: D

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