



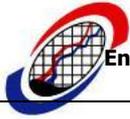
## **REQUEST FOR PROPOSAL**

### **Engagement of Training Service Provider for Investor Education Programme 2018**

This document is owned by Bursa Malaysia Berhad and/or the Bursa Malaysia group of companies ("Bursa Malaysia"). No part of the document is to be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording or any information storage and retrieval system, without permission in writing from Bursa Malaysia.

# Table of Contents

<b>1.0</b>	<b>INTRODUCTION .....</b>	<b>1</b>
<b>2.0</b>	<b>STANDARDS AND INSTRUCTIONS .....</b>	<b>1</b>
<b>3.0</b>	<b>VENDOR RESPONSE REQUIREMENTS .....</b>	<b>4</b>
<b>4.0</b>	<b>SCHEDULE OF PRICES.....</b>	<b>8</b>
<b>5.0</b>	<b>FORM OF TENDER.....</b>	<b>8</b>
<b>6.0</b>	<b>PARTICULAR OF PROSPECTIVE VENDOR .....</b>	<b>8</b>
	<b>APPENDIX I - SCHEDULE OF PRICES.....</b>	<b>7</b>
	<b>APPENDIX II – FORM OF TENDER .....</b>	<b>8</b>
	<b>APPENDIX III - PARTICULAR OF PROSPECTIVE VENDOR.....</b>	<b>9</b>
	<b>APPENDIX IV – NON DISCLOSURE AGREEMENT.....</b>	<b>9</b>



## 1.0 INTRODUCTION

### 1.1 Background

The Investor Education programme for 2018 has been restructured to include a trackable, action-driven and result-oriented programme that will not only grow the investor base but will ensure its sustainability given the knowledge and confidence acquired in the process. Following the restructuring of the programme, we are sourcing the market for a competent training service provider who will be able to provide an end to end service.

### 1.2 Purpose of the Document

This document sets forth the requirements of Engagement of Training Service Provider for Investor Education programme 2018 as stated in **Section 3.0** of this Request for Proposal (RFP).

This RFP specification belongs to Bursa Malaysia and vendors are required to hold such proprietary and confidential information in the strictest form. This document is not to be duplicated, distributed or disclosed to any third parties without written consent from Bursa Malaysia.

## 2.0 STANDARDS AND INSTRUCTIONS

This section covers the standards and instructions that must be followed by vendors in response to this RFP. Please read this RFP specification carefully. Vendors are advised to read the whole of this document.

### 2.1 Instructions to Prospective Vendors

**2.1.1** Vendors are invited to submit their RFP to address the requirements contained in this document.

**2.1.2** Vendors must submit the RFP proposal in two (2) parts:

**2.1.2.1** Part A: Vendor Response Requirements

**2.1.2.2** Part B: Financial Information and Declaration (Appendix I - Schedule of Prices, Form of Tender - Appendix II, Particular of Prospective Vendor – Appendix III, Non Disclosure Agreement – Appendix IV).

**2.1.3** The RFP must be enclosed in a **SEALED** envelope and deposited into the **Tender Box** located at the following address:-

**Senior Vice President, Administration, Finance & Corporate Services**



**Bursa Malaysia Berhad**  
**1<sup>st</sup> Floor Business Centre, Exchange Square**  
**Bukit Kewangan**  
**50200 Kuala Lumpur**

- 2.1.4** The RFP must reach Bursa Malaysia not later than **5.00PM, 4 June 2018**. Late responses will not be entertained.
- 2.1.5** The top left-hand corner of the envelope must be marked "***RFP for Engagement of Training Service Provider for Investor Education Programme 2018***". This is also required for any subsequent written correspondence. The same title must be used for electronic communications.
- 2.1.6** The RFP and all accompanying letters and documents must be submitted in 3 hardcopies and one (1) softcopy in CD or Pendrive.
- 2.1.7** English and/or Bahasa Malaysia is to be employed in any correspondence and literature.
- 2.1.8** Vendors assume the risk of the method of dispatch chosen. Bursa Malaysia assumes no responsibility for delays caused by any delivery service.
- 2.1.9** The RFP must be signed by an official who is authorised to act on behalf of the organisation submitting this proposal.
- 2.1.10** Prices must be quoted in Ringgit Malaysia (RM).
- 2.1.11** Bursa Malaysia reserves the right to accept or reject any RFP submitted.
- 2.1.12** Vendors shall responsible for all costs incurred in connection with participation in this process, including, but not limited to, costs incurred in conduct of informative and other diligence activities, participation in meetings/discussions/presentations, preparation of proposal, in providing any additional information required to facilitate the evaluation process, and in negotiating a definitive Service Agreement or all such activities related to the bid process. This RFP does not commit Bursa Malaysia to award a contract or to engage in negotiations.



**2.1.13** Vendors are required to sign a non-disclosure agreement with Bursa Malaysia.

There shall not be any breach of information and vendors are expected to keep all dealings with Bursa Malaysia strictly confidential. All information and records compiled by vendors shall be for the use of this project only and for no other purpose and must not be reproduced elsewhere.

## **2.2 Contact Persons**

All questions regarding this RFP must be submitted in writing or via e-mail to the parties listed below:-

<b>Contact Person</b>	Admin Tender
<b>Address</b>	13th Floor, Exchange Square, Bukit Kewangan, 50200 Kuala Lumpur
<b>E-Mail Address</b>	admintender@bursamalaysia.com

*Note: The clarification template is attached.*

## **2.3 Time Frame**

<b>Date</b>	<b>Action</b>
<b>25 May 2018</b>	Issuance of RFP in Bursa's Web Site
<b>1 June 2018 5.00PM</b>	Last clarification by vendors
<b>4 June 2018 5.00PM</b>	Submission of RFP Proposal by Vendors
<b>5 - 7 June 2018</b>	Selection and Evaluation
<b>18 June 2018</b>	Award of Contract
<b>29 June 2018</b>	Project Kick Start



### 3.0 VENDOR RESPONSE REQUIREMENTS

Bursa Malaysia (Bursa) continuously places great emphasis on investor education as part of our overall effort to improve financial literacy and to build a pool of savvy and well-informed investors. Investor Education programmes are designed and organised by Bursa throughout the year for participants to learn about investment on the stock exchange. The education series are crafted to motivate participants to act towards improving their financial knowledge and build confidence to enter the market in a responsible manner. Our education efforts are focused at nurturing existing and future investors to enter the market in an informed and responsible manner to ensure sustainability.

#### 3.1 Requirement 1 – Segmented Investor Programmes

Given the importance of investor education and sustainability, Bursa has restructured the investor education programme for 2018 to ensure an impactful education outreach. The education efforts will be segmented by types of investors to ensure investors experience a holistic learning journey. The investors segments and the learning outcomes are as follows:

##### a. Future Investors/Beginners

To create awareness and to equip young, potential and new investors with knowledge and information on investment opportunities on Bursa Malaysia. Awareness are also created on scams and get-rich-quick scheme.

##### Learning Outcomes

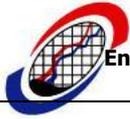
- The participant can clearly identify between different investment asset classes such as shares, properties, gold, fixed deposits, bonds, derivatives and their individual risk appetite and preferred returns.
- The participant can understand the basics of a stock market such as CDS account, trading account, bid/ask, volume, transaction orders, market depth, minimum quantity, trust accounts, price movements and other mechanics of the market.
- The participant can differentiate between market data such as prices, announcements, index, audited and unaudited financial statements and their reporting frequency.
- The participant can do basic analysis on the three financial statements (profit & loss, cash flow and balance sheet) such as understanding revenue, net profit, assets and liabilities.
- The participant will be able to analyse stocks by using technical analysis which will expose them to various types of charts such as bar charts, candle sticks and volume analysis.

##### b. Intermediate/Existing Investors

To improve and increase existing investors' capital market literacy level to a developed status and ensure investors are entering the market in an informed manner.

##### Learning Outcomes

- How one can get started on investment with RM500 and how to build a sustainable long-term portfolio.



- Participants will learn the differences between types of stocks such as warrants, ETFs, REITs, SPACs and how they can diversify their portfolio using these instruments.
- Participants will be introduced to the basics of futures market and contract specifications and how they can set up an account to trade futures. They will learn about margins, leverage, and types of orders (long, short, stop order, stop limit) available in the futures market.
- Ability to interpret financial figures over a time series and the usefulness of analysing what a good company should look like and how to appropriately analyse the risk of a stock. The topics covered will include, basic valuation techniques, risk profiling such as capital at risk vs. timing risk, P/E ratios, Dividend Yields, Cash Positions.
- Ability to use and interpret chart indicators to identify trends, support and resistance, trend reversals, price momentum, volume analysis. They will learn how to minimize trading risk by using these indicators. The topic will also cover how they can use these indicators to develop trading opportunities.
- The participants will learn about factors that affect the stock market such as interest rates, currencies, commodities prices such as gold, bond and prices. They will learn the correlation of these and the stock market.

c. Market Savvy/Professionals

To build a pipeline of professional and market savvy capital market investors and intermediaries.

Learning Outcomes

- Ability to understand the basic mechanics of a market and expected to have actively traded for more than 3 years.
- Clear understanding on stock picking and portfolio management; the importance of portfolio sizing for stocks to match the risk level; portfolio cash positions and optimum strategy.
- Risk management capability - participants will learn about hedging in the futures market and how they can trade futures to minimize and manage the risks in the underlying assets using various techniques.
- Understand the use of derivatives and equity derivatives to complement equities portfolio.
- Understand the advent of robo-investing and algorithms trading based on different strategies.
- Motivated to unlock tools and strategies to attract, build and expand clientele base to remain knowledgeable, competitive and relevant in the marketplace. Reinvigorate market intermediaries to transform into leadpreneurs who can deliver innovative individualised customer experience and service.
- Inspired to think out of the box to build an impactful brand identity to maintain long-term sustainable relationship with clientele.

d. Future Investors

To educate and create awareness amongst under graduates and secondary school students on the concept of savings via investment and basic financial literacy and planning.

Learning Outcomes

- Understand importance of savings and financial planning.
- Understand role of Bursa Malaysia and investment opportunities.
- Understand what is stock and how it works?
- Learn how to open a CDS account and the role of stock broking houses.



## REQUEST FOR PROPOSAL

### Engagement of Training Service Provider for Investor Education Programme 2018

- Learn about different investment asset classes such as shares, properties, gold, fixed deposits and bonds.
- Understand the basics of a stock market such as trading account, bid/ask, volume, transaction orders, market depth, minimum quantity, price movements and market mechanics.
- Ability to read and understand basic financial statements.

The education series reaching out to the future investors, beginners, intermediate and market savvy professionals will comprise both workshops and webinars. Vendors will need to provide for the following:

- i. Speakers for 15 half day workshops (3-hour course) to be held in Kuala Lumpur, Penang and Kuching

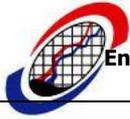
Location	No. of Workshops
Kuala Lumpur	5
Penang	5
Kuching	5
Total	15

- ii. Speakers for 4 full day workshops (6-hour course) to be held in Kota Kinabalu, Ipoh, Johor Bahru and Malacca
- iii. Speakers for 7 interactive webinars with the ability to host up to 300 participants
- iv. Each workshop is required to have a minimum of 100 to 150 participants and it is the responsibility of the vendor increase awareness of workshops and attract the required participation
- v. Media collaboration to increase awareness of programmes
- vi. The workshop series and topics needs to be based on the learning outcome stated above to ensure the participants go through a complete learning process
- vii. The workshops sessions need to be interactive to enhance participants' engagement and boost their critical thinking ability
- viii. Educational worksheets or workbook tailored to the topic of each workshop to strengthen participation and enable valuable takeaways
- ix. On- site support (max 2 staff) to ensure smooth flow of workshops
- x. Registration of participations during workshops
- xi. Post event email to thank participants and also notify on the details of the next workshop and webinar

### 3.2 Requirement 2 – Result Oriented

The programmes for 2018 need to have defined learning outcomes as the strategy going forward is to ensure outcome based education series. Hence the vendor is required to develop and provide for a microsite (to be hyperlinked to BursaMKTPLC that will enable the following:

- i. Registration for all workshops with names as per NRIC and mobile number
- ii. Payment gateway as Bursa will be imposing a nominal fee of RM10 per participant for workshops. Vendor is responsible for fee collection and subsequent remittance to Bursa
- iii. Profile creation for each participant to enable them to track their learning progress
- iv. Upload all workshop presentation slides and webinars



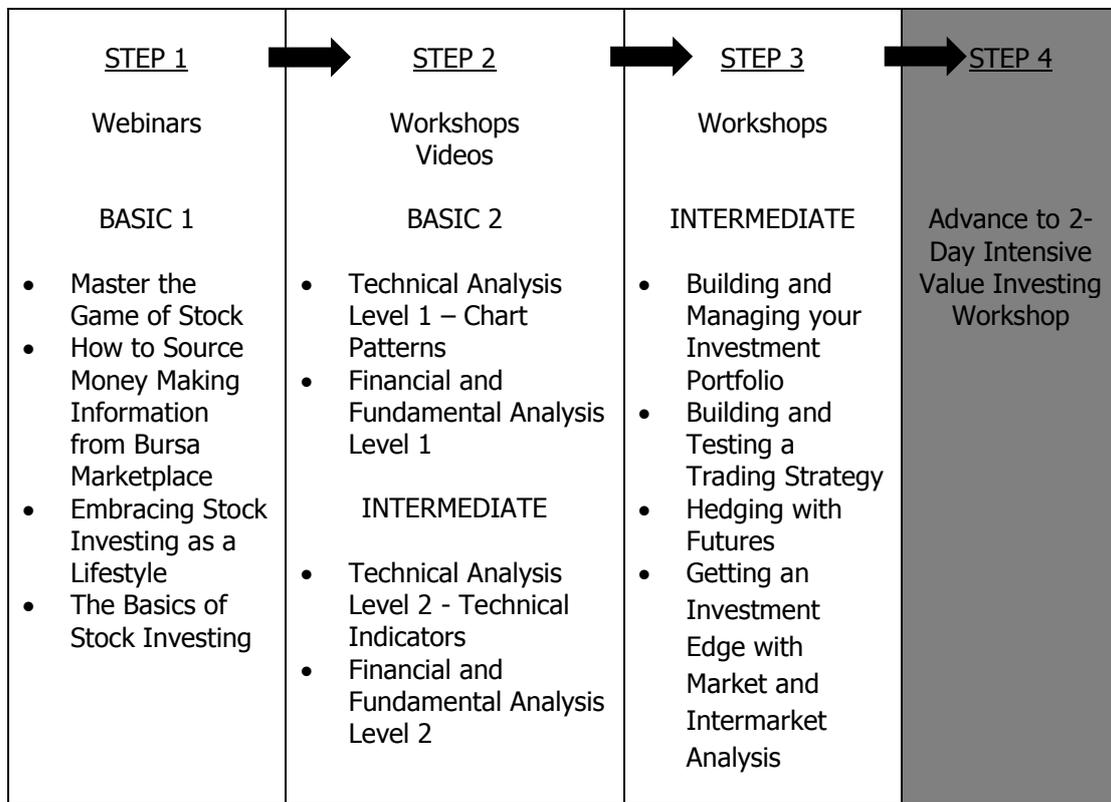
**REQUEST FOR PROPOSAL**

**Engagement of Training Service Provider for Investor Education Programme 2018**

- v. Points system – points will be awarded to participants for successful attendance in all levels (Beginners, Intermediate and Advance) which will be accumulated for participants to qualify for a 2-day intensive workshop
- vi. Online assessment post workshop – questions on subject matter to gauge participants understanding
- vii. Robust tracking and monitoring process
  - Identify participants’ understanding and knowledge level
  - Key outcome post participation i.e. opening of CDS accounts, active trading, multi assets trading and hedging

**3.3 2 Day Intensive Value Investing Workshop**

As mentioned under item 3.2, participants who complete the series of workshops and webinars will be eligible to participate in a 2-day intensive value investing workshop. The following chart depicts a holistic learning experience of participants qualifying them to participate in the above:



The 2-day intensive and practical programme will empower participants with the ability to apply their acquired knowledge by using investment tools such as market screeners and portfolio management system. Participants will be given real-life simulation to manage their “virtual capital” in their portfolio through a time-series simulation programme which will replicate different market scenarios. The objective of this simulation is to prepare and empower the participants with confidence to be ready to invest and trade on Bursa Malaysia in a confident and responsible manner.



Upon completion of the 2-day intensive programme, participants will be awarded a certification of completion for being a 'Knowledgeable Investor'. The objective of this program is to provide a complete learning journey with practical training to build investors financial literacy and confidence level leading to trading in the market in a responsible manner.

Hence, the vendor is required to provide for the above up to maximum of 4 sessions comprising 30 participants at each session. The vendor will be responsible to provide for the simulation challenge with different market scenarios to enable participants to apply the skills acquired during the workshops.

#### **4.0 SCHEDULE OF PRICES**

Vendors must complete the Schedule of Prices as per **Appendix I**. The completed Schedule of Prices must be signed by an authorised person, endorsed with a company stamp.

#### **5.0 FORM OF TENDER**

Vendors must complete the Form of Tender as per **Appendix II**. The completed Form of Tender must be signed by an authorised person, endorsed with a company stamp.

#### **6.0 PARTICULAR OF PROSPECTIVE VENDOR**

Vendors must complete the particular of prospective vendor as per **Appendix III**. The completed RFP must be signed by an authorised person, endorsed with a company stamp.



## **APPENDIX I - SCHEDULE OF PRICES**

Vendors must complete the **Schedule of Prices** as per **Appendix I**. The completed Schedule of Prices must be signed by an authorised person, endorsed with a company stamp.

Please refer to **Appendix I**.



## **APPENDIX II – FORM OF TENDER**

Vendors must complete the **Form of Tender** as per **Appendix II**. The completed Form of Tender must be signed by an authorised person, endorsed with a company stamp.

Please refer to **Appendix II**.



## APPENDIX III - PARTICULAR OF PROSPECTIVE VENDOR

Vendors must complete the **Particular of Prospective Vendor** as per **Appendix III**. The completed RFP must be signed by an authorised person, endorsed with a company stamp.



## **APPENDIX IV – NON DISCLOSURE AGREEMENT**

Vendors must complete and sign the **Non Disclosure Agreement**.

Please refer to **Appendix IV**.