



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

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COURSE BROCHURE

Investment Strategy Development For Retirement Funds And Medical Schemes Training

Business, Commerce and Management Studies / Finance, Economics and Accounting

Unit Standard 113930 · NQF Level 4 · 2 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with the skills to develop and manage investment strategies tailored to retirement funds and medical schemes. It covers the regulatory framework, risk assessment, asset allocation, and performance monitoring to ensure fiduciary compliance and long-term sustainability.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	113930
Accreditation	SAQA Accredited · NQF Level 4 · 2 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Analyze the legislative and regulatory environment governing retirement funds and medical schemes in South Africa.
- Design an investment strategy that aligns with the fund's risk profile, liabilities, and member demographics.
- Evaluate asset classes and investment vehicles to construct a diversified portfolio.
- Implement a monitoring framework to assess investment performance and compliance.
- Apply ethical and governance principles to investment decision-making processes.
- Demonstrate the ability to review and adjust investment strategies in response to changing economic conditions.

WHO SHOULD ATTEND

- This course is designed for investment committee members, fund managers, trustees, and financial advisors involved in the governance or management of retirement funds and medical schemes in South Africa.

COURSE OUTLINE

Day 1: Foundations of Investment Strategy for Retirement Funds and Medical Schemes

- Overview of the South African retirement fund and medical scheme landscape
- Regulatory requirements: Pension Funds Act, Medical Schemes Act, and prudential guidelines
- Fiduciary duties and governance of investment decisions
- Investment principles: risk tolerance, time horizon, liquidity needs
- Asset classes: equities, bonds, property, cash, and alternative investments
- Asset allocation strategies: strategic vs. tactical
- Introduction to liability-driven investing for funds
- Steps in developing an investment strategy

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **2 NQF credits** at **NQF Level 4**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 12,800.00	R 12,800.00
1	In-House	R 16,600.00	R 16,600.00
1	On-Campus (Pretoria)	R 19,200.00	R 19,200.00

UPCOMING SESSIONS

Start	End	Method	Venue
03 Aug 2026	03 Aug 2026	On-Campus	Dubai, UAE
04 Aug 2026	04 Aug 2026	On-Campus	Pretoria, South Africa
04 Aug 2026	04 Aug 2026	On-Campus	Lagos, Nigeria
05 Aug 2026	05 Aug 2026	On-Campus	Johannesburg, South Africa
06 Aug 2026	06 Aug 2026	On-Campus	Mauritius
07 Aug 2026	07 Aug 2026	On-Campus	Cape Town, South Africa
10 Aug 2026	10 Aug 2026	On-Campus	Pretoria, South Africa
11 Aug 2026	11 Aug 2026	On-Campus	Abu Dhabi, UAE

Contact us if no suitable date is listed – on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

1. **Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 113930) and click **Get A Quote / Apply**. Select your training method and number of delegates – your quotation is generated immediately and emailed to you with the course brochure attached.
2. **Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to apply@aaticd.co.za – our team will reply with a formal quotation.
3. **Apply by phone or WhatsApp:** call **+27 12 004 8389** or WhatsApp **+27 65 077 6310** and we will prepare your quotation and reserve your seats.
4. **Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically – the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

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