



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

International Investment Analysis for Wealth Management

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

Unit Standard 242563 · NQF Level 5 · 6 Credits · 3 Days

COURSE OVERVIEW

This course equips wealth managers and investment professionals with the skills to analyse international investment opportunities and integrate them into comprehensive wealth management strategies. Participants will learn to evaluate cross-border risks, regulatory frameworks, and currency impacts to optimise global portfolios.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242563
Accreditation	SAQA Accredited · NQF Level 5 · 6 Credits
Duration	3 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Analyse the role of international investments in diversifying and enhancing wealth management portfolios.
- Evaluate the impact of political, economic, and currency risks on international investment performance.
- Apply regulatory and tax considerations when selecting international investment vehicles.
- Assess the suitability of different international asset classes for client risk profiles and wealth objectives.
- Demonstrate the ability to construct and monitor a globally diversified investment portfolio.

WHO SHOULD ATTEND

- Ideal for financial advisors, portfolio managers, and wealth planners who advise high-net-worth clients or manage international assets.
- Also suitable for analysts seeking to expand their expertise into global investment analysis.

COURSE OUTLINE

Day 1: Foundations of International Investment Analysis

- Overview of international financial markets and instruments
- Asset classes: equities, fixed income, commodities, and alternatives
- Currency markets and exchange rate determinants
- Political and economic risk assessment
- Introduction to fundamental and technical analysis
- International portfolio diversification principles

Day 2: Advanced Analytical Tools and Strategies

- DCF modeling for cross-border investments
- Relative valuation: P/E, P/B, and EV/EBITDA across markets
- Sovereign credit ratings and yield spread analysis
- Currency hedging strategies: forwards, options, and swaps
- Macroeconomic analysis: GDP, inflation, and interest rates
- Portfolio optimization with international assets

Day 3: Practical Application and Wealth Management Integration

- Portfolio construction: asset allocation and security selection
- Due diligence on international funds and structured products
- Performance measurement: Sharpe ratio, alpha, and tracking error
- Rebalancing strategies and tax-efficient investing
- Regulatory compliance: SARB exchange controls and FATCA
- Client communication and reporting

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 **6 NQF credits** at **NQF Level 5**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 18,800.00	R 18,800.00
1	In-House	R 24,500.00	R 24,500.00
1	On-Campus (Pretoria)	R 28,100.00	R 28,100.00

UPCOMING SESSIONS

Start	End	Method	Venue
11 Aug 2026	13 Aug 2026	On-Campus	Pretoria, South Africa
11 Aug 2026	13 Aug 2026	On-Campus	Mauritius
12 Aug 2026	14 Aug 2026	On-Campus	Abu Dhabi, UAE
12 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa
17 Aug 2026	19 Aug 2026	On-Campus	Shenzhen, China
17 Aug 2026	19 Aug 2026	On-Campus	Pretoria, South Africa
18 Aug 2026	20 Aug 2026	On-Campus	Harare, Zimbabwe
18 Aug 2026	20 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 242563) 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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