



Accredited Africa Training Institute for Capacity Development

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

Tel: +27 12 004 8389 · Mobile: +27 65 077 6310

Email: apply@aaticd.co.za · Website: www.aaticd.co.za

COURSE BROCHURE

Macroeconomic Trends Impact on Portfolio Analysis

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

Unit Standard 242587 · NQF Level 6 · 5 Credits · 2 Days

COURSE OVERVIEW

This course equips learners with the ability to apply knowledge of macroeconomic trends and indices to evaluate the potential effect on a selected portfolio. Participants will learn to interpret key economic indicators and assess their impact on investment decisions, enabling them to make informed portfolio adjustments. The course bridges macroeconomic theory with practical portfolio analysis.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242587
Accreditation	SAQA Accredited · NQF Level 6 · 5 Credits
Duration	2 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply macroeconomic indicators and indices to assess the current economic environment.
- Analyze the impact of macroeconomic trends on different asset classes within a portfolio.
- Evaluate the potential effects of fiscal and monetary policy changes on portfolio performance.
- Demonstrate the ability to adjust portfolio strategies based on macroeconomic forecasts.
- Interpret economic data releases and their implications for portfolio risk and return.

WHO SHOULD ATTEND

- This course is designed for investment analysts, portfolio managers, financial advisors, and finance professionals who need to integrate macroeconomic insights into portfolio evaluation and decision-making.

COURSE OUTLINE

Day 1: Foundational Macroeconomic Concepts and Their Relevance to Portfolio Analysis

- Overview of macroeconomics for investment professionals
- Key indicators: GDP, inflation, unemployment, and interest rates
- Business cycles and their phases
- Monetary policy tools and transmission mechanisms
- Fiscal policy: government spending and taxation
- Impact of macroeconomic trends on equities, bonds, and commodities
- Case study: Historical macroeconomic events and market reactions

Day 2: Advanced Macroeconomic Analysis and Portfolio Strategy Integration

- Leading, lagging, and coincident indicators for portfolio timing
- Global macroeconomic linkages: trade, capital flows, and exchange rates
- Scenario analysis and stress testing frameworks
- Dynamic asset allocation based on macroeconomic regimes
- Integrating macroeconomic views into portfolio construction
- Performance attribution: macro factors vs. security selection
- Practical case study: Building a macro-aware portfolio

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

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 16,900.00	R 16,900.00
1	In-House	R 22,000.00	R 22,000.00
1	On-Campus (Pretoria)	R 25,400.00	R 25,400.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	11 Aug 2026	On-Campus	Abu Dhabi, UAE
10 Aug 2026	11 Aug 2026	On-Campus	Dubai, UAE
10 Aug 2026	11 Aug 2026	On-Campus	Mauritius
12 Aug 2026	13 Aug 2026	On-Campus	Cape Town, South Africa
12 Aug 2026	13 Aug 2026	On-Campus	Pretoria, South Africa
12 Aug 2026	13 Aug 2026	On-Campus	Durban, South Africa
18 Aug 2026	19 Aug 2026	On-Campus	Shenzhen, China
18 Aug 2026	19 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 242587) 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.

Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza, 1122 Burnett St, Hatfield 0028, Pretoria, Gauteng, South Africa
Tel: +27 12 004 8389 · WhatsApp: +27 65 077 6310 · apply@aaticd.co.za · www.aaticd.co.za