



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

Alternative Investments in Wealth Management

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

Unit Standard 242595 · NQF Level 6 · 8 Credits · 5 Days

COURSE OVERVIEW

This course equips wealth management professionals with the knowledge and insight to integrate alternative investments into client portfolios. Learners will explore the role of assets such as private equity, hedge funds, real estate, and commodities in diversifying risk and enhancing returns. The course bridges theory and practice, enabling participants to apply alternative investment strategies within a South African regulatory context.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242595
Accreditation	SAQA Accredited · NQF Level 6 · 8 Credits
Duration	5 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply knowledge of alternative investment categories to assess their suitability for different client risk profiles and wealth objectives.
- Analyze the role of alternative investments in portfolio diversification, risk management, and return enhancement.
- Evaluate the regulatory and tax implications of alternative investments within the South African financial services environment.
- Implement due diligence processes for selecting and monitoring alternative investment vehicles.
- Demonstrate the ability to construct a balanced portfolio that incorporates alternative assets alongside traditional investments.

WHO SHOULD ATTEND

- This course is designed for financial advisors, wealth managers, investment analysts, and private bankers who advise high-net-worth clients or manage discretionary portfolios.
- It is also suitable for professionals seeking to expand their expertise beyond traditional asset classes.

COURSE OUTLINE

Day 1: Introduction to Alternative Investments

- Overview of alternative investments: private equity, hedge funds, real estate, commodities, infrastructure, and collectibles
- Comparison with traditional investments: equities, bonds, and cash
- Benefits and risks of alternative investments
- Regulatory environment: FSCA, FAIS, and CISCA requirements
- Due diligence and manager selection

Day 2: Private Equity and Venture Capital

- Private equity fund structure: general partners, limited partners, and fund terms
- Venture capital: stages of financing and key players
- Valuation techniques: DCF, comparables, and LBO models
- Exit strategies: IPO, trade sale, secondary sale, and write-off
- Performance measurement: IRR, MOIC, and TVPI

Day 3: Hedge Funds and Managed Futures

- Hedge fund strategies: long/short equity, event-driven, global macro, relative value, and managed futures
- Fee structures: management fees, performance fees, and high-water marks
- Use of leverage and derivatives
- Performance analysis: alpha, beta, Sharpe ratio, and drawdowns
- Regulatory landscape: offshore funds, local funds, and investor protection

Day 4: Real Assets: Real Estate, Infrastructure, and Commodities

- Real estate: REITs, direct property, and real estate funds
- Infrastructure: core, core-plus, and greenfield investments
- Commodities: energy, metals, and agricultural products
- Inflation hedging properties of real assets
- Valuation approaches: cap rates, DCF, and replacement cost

Day 5: Portfolio Construction and Practical Integration

- Strategic asset allocation with alternatives
- Portfolio optimisation: mean-variance, risk parity, and factor-based approaches
- Performance attribution: asset allocation vs. security selection
- Liquidity planning and cash flow management
- Client suitability, reporting, and ethical considerations

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 **8 NQF credits** at **NQF Level 6**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 25,300.00	R 25,300.00
1	In-House	R 32,900.00	R 32,900.00
1	On-Campus (Pretoria)	R 38,000.00	R 38,000.00

UPCOMING SESSIONS

Start	End	Method	Venue
03 Aug 2026	07 Aug 2026	On-Campus	Pretoria, South Africa
03 Aug 2026	07 Aug 2026	On-Campus	Dubai, UAE
03 Aug 2026	07 Aug 2026	On-Campus	Cape Town, South Africa
03 Aug 2026	07 Aug 2026	On-Campus	Mauritius
03 Aug 2026	07 Aug 2026	On-Campus	Johannesburg, South Africa
03 Aug 2026	07 Aug 2026	On-Campus	Lagos, Nigeria
10 Aug 2026	14 Aug 2026	On-Campus	Mauritius
10 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa

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 242595) 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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