



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

Collective Investment Portfolio Management Techniques

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

Unit Standard 242607 · NQF Level 5 · 3 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with the technical knowledge and insight required to effectively manage collective investment portfolios. It covers the principles of portfolio construction, performance measurement, and regulatory compliance within the South African financial services context. Learners will develop the ability to apply analytical techniques to optimise portfolio outcomes and meet investor objectives.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242607
Accreditation	SAQA Accredited · NQF Level 5 · 3 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply the principles of portfolio theory to construct and manage collective investment portfolios.
- Analyze the risk and return characteristics of various asset classes within a portfolio context.
- Evaluate portfolio performance using appropriate benchmarks and measurement techniques.
- Implement regulatory and compliance requirements relevant to collective investment schemes in South Africa.
- Demonstrate the ability to make informed investment decisions based on market analysis and client objectives.
- Design rebalancing strategies to maintain portfolio alignment with investment mandates.

WHO SHOULD ATTEND

- This course is designed for investment professionals, portfolio managers, and financial advisors seeking to deepen their understanding of collective investment schemes.
- It is also suitable for compliance officers and analysts working in asset management firms or related financial institutions.

COURSE OUTLINE

Day 1: Portfolio Management Techniques and Regulatory Framework

- Overview of collective investment schemes and regulatory framework (FAIS, CISCA)
- Portfolio construction principles: strategic and tactical asset allocation
- Diversification techniques across asset classes and geographies
- Risk management: volatility, drawdown, and stress testing
- Performance measurement: total return, risk-adjusted measures (Sharpe, Sortino, Information ratio)
- Performance attribution: allocation, selection, and interaction effects
- Ethical considerations and client suitability in portfolio management
- Practical case study: constructing and rebalancing a multi-asset 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 **3 NQF credits** at **NQF Level 5**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 13,400.00	R 13,400.00
1	In-House	R 17,400.00	R 17,400.00
1	On-Campus (Pretoria)	R 20,200.00	R 20,200.00

UPCOMING SESSIONS

Start	End	Method	Venue
18 Jun 2026	18 Jun 2026	On-Campus	Windhoek, Namibia
19 Jun 2026	19 Jun 2026	In-House	–
22 Jun 2026	22 Jun 2026	On-Campus	Nairobi, Kenya
23 Jun 2026	23 Jun 2026	On-Campus	Mbabane, Eswatini
24 Jun 2026	24 Jun 2026	On-Campus	Mombasa, Kenya
24 Jun 2026	24 Jun 2026	On-Campus	Windhoek, Namibia
25 Jun 2026	25 Jun 2026	In-House	–
26 Jun 2026	26 Jun 2026	On-Campus	Maseru, Lesotho

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

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