



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

Financial Portfolio Composition Advisory

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

Unit Standard 242619 · NQF Level 6 · 6 Credits · 3 Days

COURSE OVERVIEW

This course equips financial advisors and portfolio managers with the advanced knowledge and insight required to provide expert advice on the composition of a financial portfolio. Learners will develop the ability to analyze client needs, evaluate investment options, and construct portfolios that align with financial goals and risk tolerance.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242619
Accreditation	SAQA Accredited · NQF Level 6 · 6 Credits
Duration	3 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply knowledge of financial markets and instruments to assess investment opportunities.
- Analyze client financial profiles, objectives, and risk tolerance to determine suitable portfolio compositions.
- Evaluate different asset classes and investment vehicles for their risk-return characteristics.
- Design a diversified financial portfolio that balances risk and return in line with client goals.
- Implement portfolio strategies that consider regulatory requirements and ethical standards.
- Demonstrate the ability to provide reasoned advice on portfolio adjustments based on market conditions.

WHO SHOULD ATTEND

- This course is designed for financial advisors, investment consultants, and portfolio managers seeking to deepen their expertise in portfolio construction and advisory services.
- It is also suitable for professionals in banking, insurance, and wealth management who wish to enhance their advisory skills.

COURSE OUTLINE

Day 1: Foundations of Portfolio Composition

- Overview of financial advisory and portfolio management
- Asset classes: equities, bonds, cash, property, alternatives
- Risk-return trade-off and diversification principles
- Client profiling: risk tolerance, investment horizon, financial goals
- Regulatory environment: FAIS, COFI, FSCA requirements
- Ethical conduct and fiduciary duty
- Introduction to portfolio composition process
- Case study: simple client scenario

Day 2: Portfolio Construction Techniques

- Strategic vs tactical asset allocation
- Modern Portfolio Theory: efficient frontier, correlation
- Investment vehicles: collective investment schemes, ETFs, structured products
- Portfolio rebalancing methods
- Performance measurement: total return, risk-adjusted return (Sharpe, Sortino)
- Benchmarking and peer group analysis
- Practical exercise: constructing a sample portfolio
- Case study: rebalancing a portfolio

Day 3: Advanced Advisory and Practical Integration

- Client segmentation: retail, high-net-worth, retirement funds
- Tax-efficient investing: capital gains tax, dividends tax, interest exemptions
- Retirement planning: compulsory annuities, living annuities, preservation funds
- Behavioral finance: biases, framing, client communication
- Portfolio reporting and presentation
- Compliance: record-keeping, disclosure, suitability
- Final case study: comprehensive portfolio advisory

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 6**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 19,700.00	R 19,700.00
1	In-House	R 25,600.00	R 25,600.00
1	On-Campus (Pretoria)	R 29,500.00	R 29,500.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	12 Aug 2026	On-Campus	Durban, South Africa
10 Aug 2026	12 Aug 2026	On-Campus	Dubai, UAE
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

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 242619) 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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