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

Asset Management Principles for Financial Markets and Insurance

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

Unit Standard 243130 · NQF Level 4 · 4 Credits · 1 Day

COURSE OVERVIEW

This course provides a foundational understanding of asset management principles as they apply to financial markets and insurance. Participants will learn to identify, evaluate, and manage different asset classes, including equities, fixed income, and derivatives, within the context of risk and return. The course also covers regulatory frameworks and ethical considerations relevant to the South African financial services industry.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	243130
Accreditation	SAQA Accredited · NQF Level 4 · 4 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS — verifiable online

LEARNING OUTCOMES

- Explain the fundamental concepts of asset management, including asset classes, investment vehicles, and market participants.
- Analyze the relationship between risk and return in the context of financial markets and insurance.
- Apply asset allocation and diversification strategies to construct a balanced portfolio.
- Evaluate the performance of different asset classes using appropriate benchmarks and metrics.
- Demonstrate an understanding of regulatory and ethical requirements governing asset management in South Africa.
- Describe the role of asset management in insurance, including liability-driven investment and solvency management.

WHO SHOULD ATTEND

- This course is designed for entry-level professionals in banking, insurance, investment, and financial advisory roles, as well as individuals seeking to build a career in asset management.
- It is also suitable for managers who require a working knowledge of asset management to inform decision-making.

COURSE OUTLINE

Day 1: **Foundations of Asset Management in Financial Markets and Insurance**

- Introduction to Asset Management: definitions, scope, and importance in financial markets and insurance.
- Asset Classes: equities, fixed income, cash, derivatives, and alternative investments.
- Risk-Return Trade-off: systematic vs. unsystematic risk, diversification.
- Investment Strategies: active vs. passive management, value vs. growth investing.
- Regulatory Environment: FAIS, CISCA, and prudential standards for insurers.
- Asset Allocation: strategic, tactical, and dynamic approaches.
- Portfolio Construction: Modern Portfolio Theory, efficient frontier.
- Performance Measurement: benchmarks, Sharpe ratio, alpha, and attribution analysis.

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 **4 NQF credits** at **NQF Level 4**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 9,400.00	**R 9,400.00**
1	In-House	R 12,700.00	**R 12,700.00**
1	On-Campus (Pretoria)	R 14,100.00	**R 14,100.00**

UPCOMING SESSIONS

Start	End	Method	Venue
01 Dec 2026	01 Dec 2026	On-Campus	Shenzhen, China
02 Dec 2026	02 Dec 2026	On-Campus	Mauritius
03 Dec 2026	03 Dec 2026	On-Campus	Victoria Falls, Zimbabwe
03 Dec 2026	03 Dec 2026	On-Campus	Kinshasa, DRC
04 Dec 2026	04 Dec 2026	On-Campus	Pretoria, South Africa
07 Dec 2026	07 Dec 2026	On-Campus	Johannesburg, South Africa
08 Dec 2026	08 Dec 2026	On-Campus	Blantyre, Malawi
08 Dec 2026	08 Dec 2026	On-Campus	Victoria Falls, Zimbabwe

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

HOW TO GET A QUOTATION OR APPLY

1. **Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 243130) and click **Get A Quotation**. 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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