



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

Medical Scheme Investment Strategy Fundamentals

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

Unit Standard 243140 · NQF Level 4 · 2 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with a thorough understanding of the investment strategy of a selected medical scheme. It covers the principles of medical scheme investment, including asset allocation, risk management, and regulatory compliance. Learners will be able to evaluate and contribute to the investment decision-making process within a medical scheme context.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	243140
Accreditation	SAQA Accredited · NQF Level 4 · 2 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Demonstrate knowledge of the regulatory framework governing medical scheme investments in South Africa.
- Analyze the components of an investment strategy, including asset allocation and risk management.
- Evaluate the performance of investment portfolios against defined benchmarks and objectives.
- Apply principles of liquidity, solvency, and capital adequacy to medical scheme investment decisions.
- Implement monitoring and reporting procedures for investment strategy compliance.
- Assess the impact of economic and market factors on medical scheme investment performance.

WHO SHOULD ATTEND

- This course is designed for financial professionals, medical scheme administrators, and healthcare fund managers who are involved in or responsible for investment strategy formulation and oversight within medical schemes.

COURSE OUTLINE

Day 1: Medical Scheme Investment Strategy Fundamentals

- Introduction to medical scheme investment strategy and its importance
- Investment principles: risk, return, and diversification
- Regulatory framework: Medical Schemes Act and Prudential Standards
- Asset classes: equities, bonds, cash, and alternative investments
- Asset-liability matching and liquidity management
- Performance measurement and benchmarking
- Governance and investment policy statements
- Case study: investment strategy for a typical medical scheme

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

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 12,800.00	R 12,800.00
1	In-House	R 16,600.00	R 16,600.00
1	On-Campus (Pretoria)	R 19,200.00	R 19,200.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	10 Aug 2026	On-Campus	Dubai, UAE
11 Aug 2026	11 Aug 2026	On-Campus	Pretoria, South Africa
12 Aug 2026	12 Aug 2026	On-Campus	Abu Dhabi, UAE
13 Aug 2026	13 Aug 2026	On-Campus	Durban, South Africa
13 Aug 2026	13 Aug 2026	On-Campus	Mauritius
14 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa
17 Aug 2026	17 Aug 2026	On-Campus	Pretoria, South Africa
18 Aug 2026	18 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 243140) 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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