



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

Tel: +27 12 004 8389 · Mobile: +27 65 077 6310

Email: apply@aatikd.co.za · Website: www.aatikd.co.za

COURSE BROCHURE

Investment Strategy of Group Retirement Funds

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

Unit Standard 243145 · NQF Level 4 · 2 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with the knowledge and understanding required to evaluate and contribute to the investment strategy of a group retirement fund. It covers the regulatory environment, investment principles, risk management, and performance measurement. By the end, learners will be able to assess the suitability of investment strategies for different fund objectives and member demographics.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	243145
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 understanding of the regulatory framework governing group retirement fund investments in South Africa.
- Analyze the investment objectives and risk tolerance of a selected group retirement fund.
- Evaluate different asset classes and investment vehicles for inclusion in a retirement fund portfolio.
- Assess the performance of investment strategies using appropriate benchmarks and metrics.
- Apply principles of asset-liability modeling and diversification to optimize fund returns.
- Recommend adjustments to the investment strategy based on changes in market conditions or fund demographics.

WHO SHOULD ATTEND

- This course is designed for retirement fund trustees, investment committee members, fund administrators, and financial advisors who need to understand and participate in the investment decision-making process of group retirement funds.

COURSE OUTLINE

Day 1: Investment Strategy of Group Retirement Funds

- Overview of group retirement funds and their importance.
- Legislative framework: Pension Funds Act, Regulation 28, and prudential guidelines.
- Investment objectives and constraints for group retirement funds.
- Asset classes: equities, bonds, property, cash, and alternatives.
- Strategic vs. tactical asset allocation.
- Risk management: currency risk, interest rate risk, inflation risk.
- Performance measurement and benchmarking.
- Governance and fiduciary responsibilities of trustees.

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	Durban, South Africa
10 Aug 2026	10 Aug 2026	On-Campus	Mauritius
11 Aug 2026	11 Aug 2026	On-Campus	Cape Town, South Africa
12 Aug 2026	12 Aug 2026	On-Campus	Dubai, UAE
13 Aug 2026	13 Aug 2026	On-Campus	Pretoria, South Africa
14 Aug 2026	14 Aug 2026	On-Campus	Abu Dhabi, UAE
17 Aug 2026	17 Aug 2026	On-Campus	Shenzhen, China
18 Aug 2026	18 Aug 2026	On-Campus	Dubai, 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 243145) 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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