



FINANCE AND TREASURY TRAINING

Portfolio Management and Investment Analysis

5 day course

Classroom, online or in-house

Course overview

This course covers the construction and management of an investment portfolio. Delegates work through asset classes and their behaviour, risk and return measurement, diversification and correlation, portfolio construction approaches, and performance measurement and attribution that distinguishes skill from market movement. The material addresses the practical constraints of African portfolios specifically: thin market liquidity, concentration in a small number of listed names, currency exposure and the restrictions many institutional mandates carry. Delegates work with real market data and build and defend a portfolio against a stated mandate.

What you will learn

- Describe the main asset classes and how each behaves
- Measure risk and return and interpret the standard ratios
- Apply diversification and correlation in portfolio construction
- Construct a portfolio against a stated mandate and constraint set
- Measure performance and attribute it between skill and market movement
- Manage liquidity, concentration and currency constraints in African markets
- Rebalance a portfolio and account for the cost of doing so

Who should attend

- Investment analysts and portfolio managers
- Pension fund and trustee staff
- Treasury and finance professionals
- Wealth and private client advisers
- Regulators and supervisors of investment institutions

Course outline

- 01 Asset classes and their behaviour
- 02 Risk and return measurement
- 03 Diversification, correlation and its instability
- 04 Portfolio construction approaches
- 05 Mandates, constraints and their effect
- 06 Performance measurement and attribution
- 07 Liquidity, concentration and currency in African markets
- 08 Rebalancing and transaction cost

Upcoming dates

Dates	Venue	Format	Fee per delegate
29 September to 3 October 2026	Pretoria, South Africa	Classroom	R11,995
4 to 8 October 2026	Lilongwe, Malawi	Classroom	R11,995
21 to 25 October 2026	Victoria, Seychelles	Classroom	R11,995
31 October to 4 November 2026	Maseru, Lesotho	Classroom	R11,995



Fees and how to register

Online **from R6,500** per delegate, classroom **from R11,995** per delegate, in-house training is quotation on request. Book 2 or more delegates on this course and save 10%.

To register or request an in-house proposal, visit www.afrisciencegroup.com, email info@afri-science.co.za, or WhatsApp us on **+27 63 479 1136**.

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