



FINANCE AND TREASURY TRAINING

Pension Fund Investment Strategies

5 day course

Classroom, online or in-house

Course overview

A pension fund invests against liabilities that extend decades ahead, and the strategy must serve those liabilities rather than a return target in isolation. This course covers the discipline. Delegates work through liability assessment and its drivers, strategic asset allocation against a liability profile, liability driven investment approaches, the selection and monitoring of managers, and the governance obligations that trustees carry personally. Regulatory requirements are covered, along with the specific constraints of African pension markets including limited domestic asset supply, offshore allocation limits and currency exposure.

What you will learn

- Assess a fund's liabilities and the factors that drive them
- Set strategic asset allocation against a liability profile
- Apply liability driven investment approaches
- Select, monitor and replace investment managers
- Discharge trustee governance obligations
- Meet regulatory requirements applicable to the fund
- Manage domestic asset supply, offshore limits and currency exposure

Who should attend

- Pension fund trustees and principal officers
- Fund administrators and investment staff
- Consultants and actuaries advising funds
- Regulators and supervisors
- Employer representatives on fund boards

Course outline

- 01 Liabilities and what drives them
- 02 Strategic asset allocation against a liability profile
- 03 Liability driven investment approaches
- 04 Manager selection, monitoring and replacement
- 05 Trustee governance and personal obligation
- 06 Regulatory requirements
- 07 Domestic asset supply and offshore allocation limits
- 08 Currency exposure across a long horizon

Upcoming dates

Dates	Venue	Format	Fee per delegate
12 to 16 October 2026	Online	Online	R8,500
18 to 22 January 2027	Accra, Ghana	Classroom	USD 1,325
8 to 12 March 2027	Gaborone, Botswana	Classroom	R19,950

Fees and how to register

This 5 day course is **R8,500** per delegate online, **R19,950** in the classroom in South Africa, Botswana, Namibia, Lesotho and Eswatini, and **USD 1,325** in the classroom elsewhere in Africa. 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@afriScience.co.za, or WhatsApp us on **+27 63 479 1136**.

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