



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
12 to 16 October 2026	Maseru, Lesotho	Classroom	R19,950
30 November to 4 December 2026	Mbabane, Eswatini	Classroom	R19,950
14 to 18 December 2026	Lusaka, Zambia	Classroom	USD 1,325
25 to 29 January 2027	Online	Online	R8,500



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@afiscience.co.za, or WhatsApp us on **+27 63 479 1136**.

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