



ASISA ACADEMY
FINANCIAL SERVICES
INDUSTRY OVERVIEW
BLITZCAMP
BROCHURE

1. THE PURPOSE OF THE COURSE

An introduction to the financial services industry painting the big picture of how the industry fits together, describing the main role players, showing the flow of funds through the industry as well as the typical products offered by the various businesses.

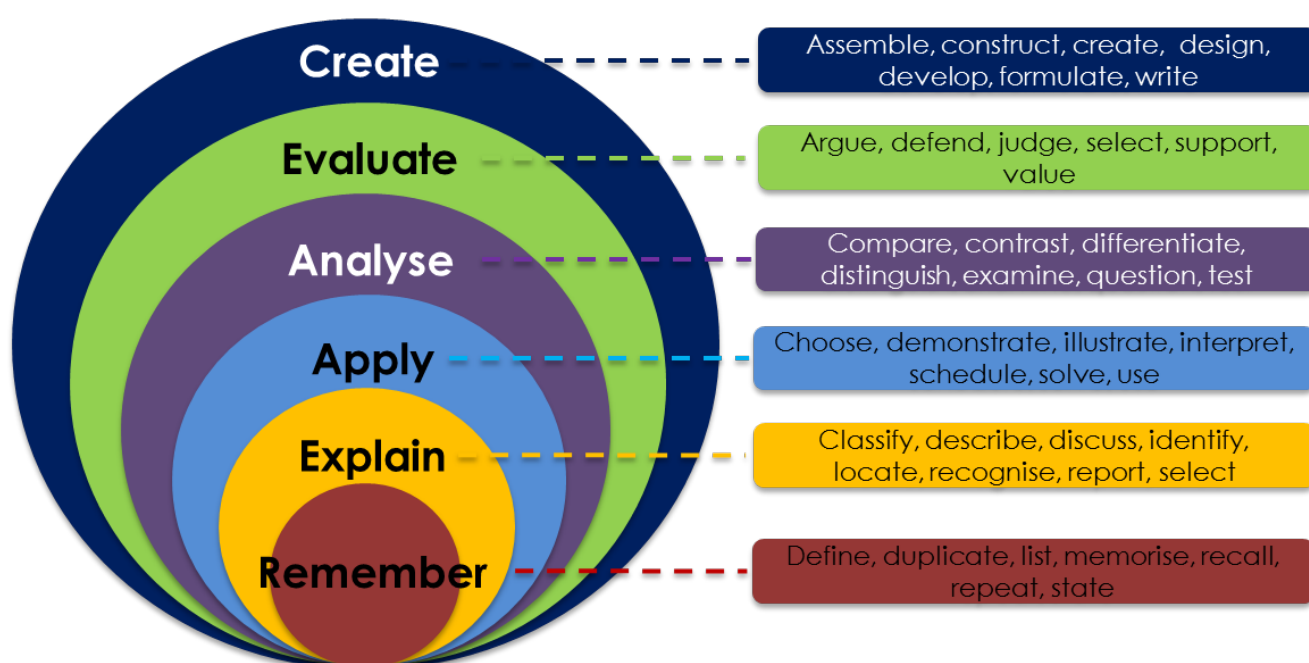
An additional one-on-one Industry Overview is available for newly appointed Senior Executives with little or no investment or insurance industry experience. The intention is to provide a safe, independent space for a new executive or company board member to get to grips rapidly with the nuances of the industry. The overview will be facilitated by a highly experienced practitioner with prior experience at the highest levels in the industry.

2. ACADEMY VISION & CONTEXT

The ASISA Academy creates and delivers high quality solutions to meet the skills development needs of South African Savings, Life Assurance and Investment Management organisations. Our learning solutions are informed by and responsive to industry realities and delivered in an academically sound and practitioner-led manner. 8,500 people in the Southern African financial services sector have learned with the ASISA Academy since 2008 with over 700 industry presenters keeping the learning rooted in reality. The Academy has a Level 1 B-BBEE rating.

3. APPROACH TO LEARNING

We work hard at the ASISA Academy to ensure every learning experience is as interactive as possible. To achieve this, we draw on the expertise of some of the most experienced and specialised professionals in the industry and we limit the size of our groups. The following diagram captures the Academy approach to learning. We aim to achieve the bulk of our learning in the biggest circles.



Class sizes are limited to enable a supportive learning environment in which no committed participant gets left behind. Delegates will be required to bring a laptop or tablet in order to make full use of the online learning environment during the sessions.

4. COURSE LEARNING OUTCOMES

| TOPIC | LEARNING OUTCOMES By the end of the course successful delegates will be able to... |
|--|---|
| How the industry fits together – investors & products | <ul style="list-style-type: none"> • Define the different types of investors and their needs. • Contrast the different savings and investment vehicles available. |
| Investment philosophies | <ul style="list-style-type: none"> • Show why there are so many fund managers. • Contrast and critique different investment philosophies. |
| Financial landscape – role players | <ul style="list-style-type: none"> • List the role players in the financial services sector showing how they interact and depend on each other. • Position ASISA and define its role in the landscape. |
| Product channels – Overview | <ul style="list-style-type: none"> • Define the concepts of financial products and product channels. |
| Product channels – CIS, FoF, MM and LISP | <ul style="list-style-type: none"> • Contrast the workings of a CIS, fund of funds, multi manager and a LISP |
| Product channels - Life insurance & pension funds | <ul style="list-style-type: none"> • Demonstrate how life offices and pension funds work and distinguish between the different savings and investment needs they meet. |
| Governance – Legislation | <ul style="list-style-type: none"> • Provide an overview of the web of South African financial services legislation. |
| Governance - Ethics | <ul style="list-style-type: none"> • Define ethics. • Discern between practices that are legal but unethical. • Critically analyse case studies of common market practices and judge which are unethical |
| Risk and Return | <ul style="list-style-type: none"> • Contrast the returns over time on each market. • Calculate typical return measures. • Explain why risk should always be considered in conjunction with return. |

5. FEEDBACK FROM PAST CANDIDATES

Some comments from Academy candidates about their experience on our programmes...

"Today's session meant that I could consolidate everything that I had learnt over the days of the course. It has been very valuable. I am very excited about the knowledge I have gained. Great course!"

"This is much more (content wise and experience) than I expected. The enthusiasm of the lecturing/organising team is infectious."



"Great lecturers from the industry that has a wealth of knowledge to share. Thoroughly enjoyed it!"

"In a nutshell, the investment industry summed up in a week and getting top industry professionals to simplify complexity in our working environment was one of the most fulfilling things in my career. I am ready to apply all the concepts learned and continue to question status quo."

"What an educational and enjoyable week! I've learned a lot and can't wait for the next week to begin! Everything is run well from the time set aside for presentations to the contents of presentations."

"I think, for me anyway, that a huge part of the value of the course lies in the contacts made through the course – with leaders in the industry as well as colleagues grappling with the same issues."



"Great course, thank you for this wonderful opportunity! Can't wait for next course."

"The presenters were all extremely well prepared. It was fantastic to get the insights from all of the experienced individuals!"

6. CONTACT INFORMATION

For more information please contact the Academy via:

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