



ASISA ACADEMY
INVESTMENT
MANAGEMENT
BUSINESS OVERVIEW
BLITZCAMP
BROCHURE

1. THE PURPOSE OF THE COURSE

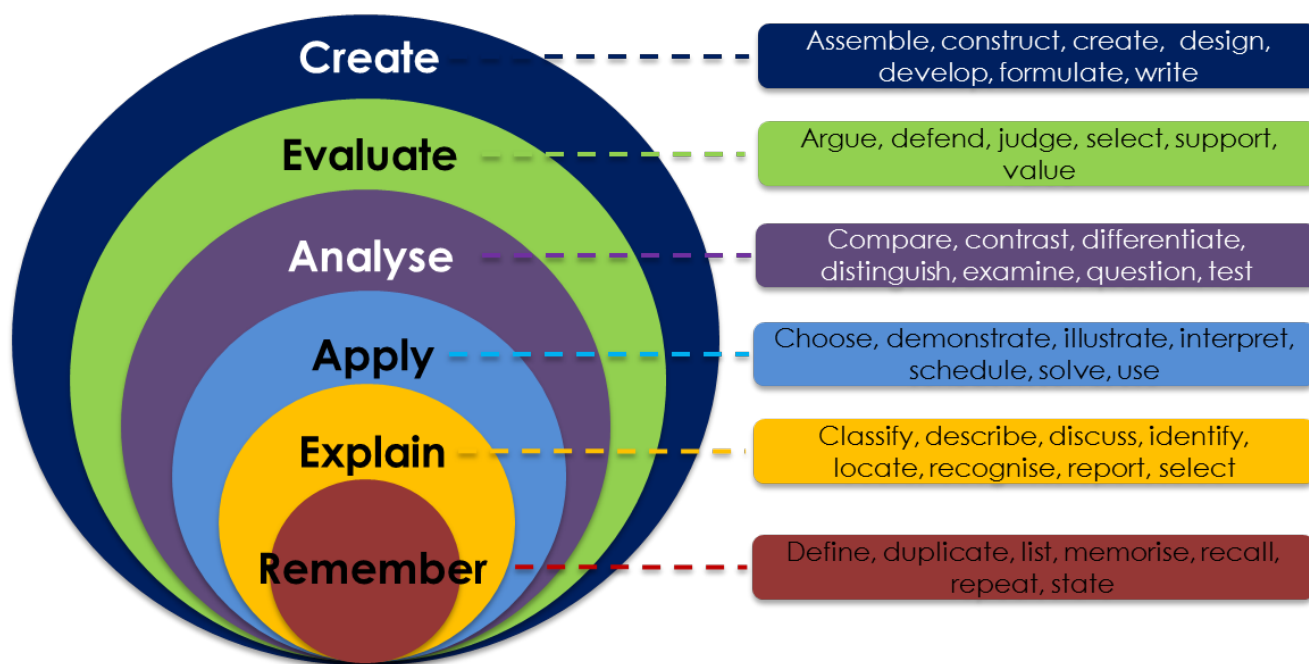
An introduction to the investment business industry providing a broad overview of how an investment management business is structured and the workflow through the firm. This Blitzcamp builds on the foundational learning from the Financial Services Industry Overview Blitzcamp showing candidates how investment research, portfolio management, dealing, administration, governance and technology fit together at an investment management firm. It also considers how the firm interacts with other industry players such as stockbrokers, the JSE & STRATE and outsourced service providers.

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. ACTIVE 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...
Flow of funds through to the Investment Manager	<ul style="list-style-type: none"> • Provide an overview of the investment product landscape.
Engaging with Clients	<ul style="list-style-type: none"> • Demonstrate the investment client engagement process including benchmarks, mandates and client reporting.
Investment process	<ul style="list-style-type: none"> • Show the processes of investment research, constructing & managing the portfolio.
Investment business structures	<ul style="list-style-type: none"> • Show the role players and relationships within the investment management landscape. • Examine the structure of the investment management firm. • Contrast the insourcing vs outsourcing of services.
The trade cycle – Equity instruments	<ul style="list-style-type: none"> • Illustrate the trade cycle for equity instruments: order, execution, allocation, matching, confirmation, clearing and settlement.
Pricing	<ul style="list-style-type: none"> • Demonstrate how to price both individual instruments and portfolios.
Performance conventions, analysis & reporting	<ul style="list-style-type: none"> • Show the different approaches to calculating and analysing performance • Apply the Global Investment Performance Standards (GIPS) in their contexts

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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