

## Pension Fund and Investment Management Course Details

Department: Banking and Financial Services

Presented by Magna Skills Development Institute

[Registration Link](#)

Date Created: 07-Jun-2025

Training Coordinator: Denis Wunganayi

### EMPOWERING WORKFORCE THROUGH QUALITY TRAINING

- ✓ Expert Facilitators
- ✓ Customized Course Content
- ✓ Practical, Results-Oriented Training
- ✓ Trusted by Governments & Development Partners Across Africa

#### Contact Us:

+27 6300 79022  
[www.magnaskills.com](http://www.magnaskills.com)

REGISTER NOW



## Course Summary

The program is designed as a pilot course on a risk focused approach to pension fund management and supervision. Within the framework of a risk focused approach, case studies and vignettes will be used to examine the desired outcomes of a pension system, identify and assess the risks involved in achieving those outcomes, the chronology of problem evolution, and how to resolve the problems.

The program will be highly interactive and practical, using case studies, group discussions, and breakout sessions to foster debate and effectively transfer knowledge from the vast and deep experiences of our program leaders and all of the participants joining us from around the world.

## Course Objectives

- Understand what institutional investors are and how they operate
- Identify the characteristics of the principal asset classes
- Identify and distinguish between the principal investment products
- Understand the importance of establishing investor preferences
- Understand the basic principles of portfolio construction
- Distinguish between active and passive portfolio strategies and styles
- Differentiate between equity and fixed income management styles
- Understand the interaction between institutional investors and brokers/investment banks

## Course Outline

### INTRODUCING THE INVESTMENT MANAGER

- What is investment management?
- Industry development, ownership and structure
- Industry drivers
- Current trends and themes

### THE INVESTMENT MANAGEMENT PROCESS

- Establishing investor objectives
- Investment return profile
- Risk tolerances and investment constraints

- Portfolio construction and risk management
- Portfolio monitoring and administration
- Performance evaluation –measurement and attribution

## **PRINCIPALS OF PORTFOLIO CONSTRUCTION**

- Strategic asset allocation – definition and formulation
- Principal asset characteristics - expected return and volatility (risk)
- Typical strategic weightings and a stylized investment cycle
- Tactical asset allocation
- The concept of correlation
- Diversification and the efficient frontier

## **KEY PLAYERS IN THE INVESTMENT DECISION PROCESS**

- The asset allocation committee
- The Trustee Board and consulting actuaries
- The portfolio manager and the ‘buy-side’ analyst
- The centralized dealing desk

## **MANAGING AN EQUITY PORTFOLIO**

- Active equity investment strategies – motivations and characteristics
- Styles: growth, income, value, technical etc.
- Passive equity investment
- Strategies – motivations and characteristics
- Methods: replication, sampling, optimization and synthetic
- Hedge funds: a different active strategy

## **MANAGING A FIXED INCOME PORTFOLIO**

- Active fixed income investment strategies – motivations and characteristics
- Passive fixed income investment strategies – motivations and characteristics

## **FUND MANAGEMENT AND DERIVATIVES**

- The major products: equity, debt, foreign exchange
- Equity options: volatility / delta /gamma

- Equity futures / equity swaps
- Fixed income derivatives / interest rate swaps
- Credit derivatives / default swaps

## INVESTMENT PRODUCTS – AN OVERVIEW

- Pension funds – defined benefit and contribution
- Collective investment schemes –mutual funds, unit trusts & OEICs
- Investment trusts
- ISAs
- Exchange-Traded Funds (ETFs)
- Hedge funds – the new investors
- Private client wealth management



**AVAILABLE IN-  
PERSON, ONLINE  
& ON-SITE  
JOIN TODAY**

**WWW.MAGNASKILLS.COM  
+27 6300 79022**



## Company Overview

**Who We Are:** Magna Skills is a premier training and capacity-building organization specializing in professional development for government institutions, NGOs, and the private sector.

**Our Mission:** To provide world-class training solutions that equip professionals with the expertise needed to excel in their careers and contribute meaningfully to their organizations.

**Our Vision:** To be the leading provider of professional training and development across Africa, fostering excellence, innovation, and capacity-building in public and private sectors.

## Core Values

- **Excellence** – Delivering high-quality training tailored to meet the evolving needs of professionals.
- **Integrity** – Upholding the highest ethical standards in all our engagements.
- **Innovation** – Embracing new technologies and methodologies to enhance learning experiences.
- **Customer-Centric Approach** – Ensuring client satisfaction by providing relevant, practical, and impactful training.
- **Collaboration** – Partnering with industry experts and institutions to provide the best learning opportunities.

## Our Training Methodology

We use a blended learning approach that includes instructor-led training, case studies, workshops, and post-training support.

## Why Choose Magna Skills?

- Experienced Trainers
- Customized Training Solutions
- Interactive Learning
- Global Recognition
- Proven Track Record

Request for Training Form

Complete the form and share with Magna Skills Support Team on email info@magnaskills.com or Send Whatsapp on: +27630079022

| Approval & Authorization |   |
|--------------------------|---|
| Applicant Details        | Course Details  |
| First Name:              | Course Name:  |
| Last Name:               | Training Venue:                                       |
| Mobile:                  | Month:  |
| Email:                   | Training Method: Online[ ____ ] Face to Face [ ____ ] |
| Company Name:            | Duration:   |
| Country:                 | Number of Staff Members:                              |

By signing this agreement, both parties confirm their commitment to the terms outlined in this proposal.