

INVESTMENT OF PENSION FUND ASSETS: PORTFOLIO MANAGEMENT AND INVESTMENT ANALYSIS

BANKING, FINANCIAL SERVICES AND PENSIONS PORTFOLIO



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INVESTMENT OF PENSION FUND ASSETS: PORTFOLIO MANAGEMENT AND INVESTMENT ANALYSIS

COURSE OUTLINE

Pension schemes face a set of complex and often difficult challenges relating to the investment of its assets, emanating from, inter alia, the need to grow the real value of pension funds by generating investment returns on one hand whilst assuring the preservation of members' capital on the other. The sheer size of pension schemes' assets relative to investment markets creates challenges unique to institutional investors who must carefully manage entry and exits into investment positions.

This programme builds delegates' knowledge from first principles by examining the current landscape of pension fund investment and the key tenets of investment analysis – including valuation techniques – and portfolio management theory and practice. The mainstream asset classes in pension fund investment, viz. bonds and equities are covered in detail and the course also provides an introduction to alternative investment classes including Real Estate, Private Equity and Infrastructure and their role in enhancing portfolio diversification and risk-adjusted returns.

Fund performance analysis, including attribution, is important to both ensure that pension schemes remain on target to grow investment funds to meet their liabilities as well as to assess the performance of fund managers and the programme provides delegates with a full understanding of key performance analytical methodologies as well as the interpretation of analyses.

COURSE OBJECTIVES: On completion, you will be able to:

- Understand the principal asset valuation techniques
- Appreciate the limitations of public security investment
- Analyse the risks and return potential of the major asset classes
- Understand the tenets of modern portfolio theory
- Appreciate the potential benefits of, and risks pertaining to, private market investment
- Analyse the key risks of different asset types

KEY TOPICS

- Risk pricing across the principal asset classes
- Equity market analysis and valuation techniques
- The role of bonds and money market securities in pension funds
- Bond valuation and key risk measures including duration
- Analysing the risk and return profiles of Private Equity and Infrastructure investment
- Understanding asset-liability risk from a pension fund perspective
- The critical role of liquidity in contemporary investment
- Risk management and the role of derivatives

DURATION	FEE	DATE	VENUE
05 days	£2,250	22 - 26 April 2024	Kigali
	£2,650	21 - 25 October 2024	London

“ON DEMAND” COURSES



In addition to the scheduled dates shown, we are flexible to schedule additional dates to our calendar in a location of your choice. To ensure we can explore adding an additional date, do aim to contact us with your request with a minimum of 4 months' notice to allow the course to be advertised.

WE REWARD LOYALTY

We offer all our clients a '4+1' loyalty scheme. For every four delegates enrolled from an organisation in any calendar year, we will provide you with one additional place, free of charge.

“Extraordinary presenter and insightful and impactful.”

MAXWELL ATAJDA, Head of Finance, GES Occupational Pensions, Ghana.



FEATURED TRAINER DUNCAN HUGHES

Duncan has over 25 years of experience in financial services across the banking, asset management and insurance sectors.

During his career in financial services he held many senior positions at major financial firms including NM Rothschild and Columbia Threadneedle. In recent years, he has specialised in developing market financial services and pensions and has lectured and consulted widely in South-East Asia and Africa. He is the author of a number of publications in the fields of investment, financial risk management and on the opportunities presented by new financial technologies, including blockchain, particularly in a development context.