



INVESTMENT MANAGEMENT MASTERCLASS

KES 65,000 TAX EXCLUSIVE DATE: 17TH TO 19TH NOVEMBER 2021

VENUE: ENASHIPAI RESORT & SPA, NAIVASHA

Enhancing your
return through
prudent
investment

17th - 19th November 2021 INVESTMENT MANAGEMENT MASTERCLASS

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SESSION 1 Introduction to Investment

Trainer

Seasoned investment
manager

- a. An introduction to financial markets
- b. Role of financial markets in an economy
- c. Key investor clients within financial markets
 - I. Pension Funds
 - II. Insurance Companies
 - III. High Net Worth Individuals (HNWI)
 - IV. Retail investors/Individual
 - V. Other Institutional investors
 - VI. Sovereign Wealth Fund

SESSION 2 The major players in the financial markets

Trainer

Seasoned investment
manager

- a. The regulators
- b. The Custodians
- c. The fund managers
- d. The administrators
- e. Trading participants
- f. Registrars
- g. Issuers of Securities

For more information or to make reservations contact:

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SESSION 3

Main
investment
instruments in
the Kenyan
market

Trainer

Executive Officer
NSE PLC

- a. Equities
- b. Bonds
- c. Exchange Traded Funds
- d. Real Estate Investment Trusts
- e. Derivatives
- f. Real estate
- g. Money markets
- h. Private equities/Non Quoted securities
- I. Venture capital
 - II. Offshore investments
 - i. Emerging investment opportunities
 - I. The NSE Unquoted Securities platform
 - II. Non Listed Securities

SESSION 4

The Portfolio
construction and
management
process

Trainer

Seasoned investment
manager

- a. Return on investment concepts
- b. Risk on investment concepts
- c. Risk return relationship/Tradeoff
- d. The risk premium concept
- e. The diversification concept
- f. Calculating return of different instruments

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SESSION 5 Understand portfolio construction and asset allocation

Trainer

Seasoned investment
manager

a. Planning

- I. Identification of client objectives and constraints
- II. Capital markets expectations
- III. Investment policy statement

b. Execution

- I. Asset Allocation – strategic and tactical
- II. Security analysis
- III. Portfolio construction

c. Feedback

- I. Portfolio monitoring and rebalancing
- II. Portfolio performance measurement and reporting
-Sample Reports

d. Emerging trends

- I. Scheme members participation in property markets
- II. Low cost housing
- III. Future of mortgage market

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