



# INVESTMENT MANAGEMENT MASTERCLASS

**KES 65,000 TAX EXCLUSIVE**

**VENUE: ENASHIPAI RESORT & SPA, NAIVASHA**

**19th - 21st December 2022**

Enhancing your  
return through  
prudent  
investment

# INVESTMENT MANAGEMENT MASTERCLASS

Enhancing your return through prudent investment

## 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:**

# INVESTMENT MANAGEMENT MASTERCLASS

Enhancing your return through prudent investment

## 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

For more information or to make reservations contact:

# INVESTMENT MANAGEMENT MASTERCLASS

Enhancing your return through prudent investment

## 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

### For more information or to make reservations contact: