

INVESTMENT MANAGEMENT TO MAGNIFY RETURNS TRAINING COURSE

DATE: 9TH TO 13TH JANUARY 2023

**VENUE: SUN AFRICA BEACH RESORT (COCOA BOUTIQUE
HOTEL), MOMBASA**

COST: KSHS 92,500 EXCLUDING VAT PER PERSON

NITA REGISTERED: NITA/TRN/916

IHRM ACCREDITED: Coo380

INTRODUCTION

Investment management involves a broad spectrum of responsibilities revolving around the management of financial assets, and not just buying or selling them. Other complex aspects of this field relate to devising strategies to acquire and dispose of assets from time to time, to manage risks and prevent business loss.

Detailed analyses are conducted to reach fruitful conclusions regarding financial next steps and investments. Banking, budgeting and tax-saving are important elements of this field of financial planning and management.

Formal training is thus required to help professionals acquire adequate knowledge and understanding of all aspects of investment management, covering property, stocks, pension funds, etc

OBJECTIVES

The key objective of this training course is to empower professionals with—

- an in-depth understanding of all critical aspects of investment management, including property, stock, pension funds, etc.
- the required knowledge to adopt a dynamic approach to work, capable of successfully undertaking multiple roles within one's organisation, aiding career progression
- the required multitasking skills to work on multiple areas at one time and successfully deliver what is expected from these
- the necessary confidence and knowledge to train other professionals on important aspects of investment management
- the ability to review available information and draw important conclusions, effectively identifying risks and devising strategies to mitigate these
- credibility for one's ability to contribute to organisational growth and development, while effectively managing risks for the organisation

- the ability and knowledge to stay updated with market trends and changing industry demands so as to sustain competition
- the awareness and experience to ensure that organisational processes and policies are in line with required standards and benchmarks, protecting the organisation and clients against unnecessary allegations and claims
- the ability to work with advanced technology for expediting analyses to reach accurate decisions
- the overall skill set and capabilities to work in any role across any organisation in the industry, thus extending one's progress to beyond one's current organisation

BENEFITS TO PARTICIPANTS

Professionals opting for this training course will benefit in the following ways:

- Complete understanding and detailed information about investment management, including property, stock, pension funds, etc.
- Enhanced multitasking skills to be able to successfully and simultaneously handle multiple responsibilities across various portfolios, thus demonstrating one's potential and capability to assume higher roles and responsibilities within one's organisation
- Increased confidence and knowledge to train other professionals on important concepts in investment management
- Improved analytical skills to review available financial information and data and draw accurate conclusions and devise appropriate next steps
- Greater credibility to contribute to client success and organisational development through accurate risk assessments and mitigation, thereby fostering faster career growth and development
- Better understanding and awareness to stay updated with changing market trends and requirements and ensure that one's organisational policies also stay updated and ahead of the competition, in turn contributing immensely to one's organisation and securing one's future progression therein
- Increased knowledge and confidence to work with advanced technology to conduct faster and more efficient analyses and devise effective and relevant next steps
- Enhanced skill set and capabilities to work in any role across the industry, thus extending one's scope for growth opportunities beyond one's organisation

BENEFITS TO THE ORGANIZATION

With professionals undergoing this training course, organisations will derive the following benefits:

- Successful investment management activities of property, stock, pension funds, etc. handled by trained and experienced professionals
- Effective risk prediction, assessment and mitigation because of detailed analyses of available financial information
- Greater organisational credibility as a result of greater success owing to the team of trained professionals working for clients
- Organisational growth with the increasing clientele and lesser risks and liabilities
- Adherence to required investment standards and benchmarks at an industry level
- Application and use of advanced technology for effective and quick analyses and accurate conclusions and next steps
- Regular training and upskilling of other employees on best practices and newer trends concerning investment management
- Continuous update of existing processes to stay ahead of the competition and be a leading player in the market

UNIQUE ADD-ON BENEFITS TO YOUR ORGANIZATION

DGMB will provide the following additional benefits to your organization:

- (i) DGMB will email content containing training materials to your organization which will serve as a reference material to current and future staff.
- (ii) DGMB will issue certificates of participation to each participant
- (iii) DGMB will provide a group photo to your organization.

TARGET GROUP

- Executives and managers handling various aspects of investment management in firms
- Top management of organisations who should understand all aspects of investment management well to take accurate decisions
- Existing investment analysts wishing to increase their knowledge in other areas of investment management
- Pension fund managers and trustees handling pension funds and schemes across organisations
- Compliance staff of organisations responsible for ensuring adherence to required benchmarks and standards
- Any other professional interested in studying investment management in detail

OUR TRAINING METHODOLOGY

At DGMB, we have spent a couple of years developing and refining our training approach. Our proposed training methodology is laid out below. Our team of facilitators will adopt a practical and experimental approach. This will include supervised micro-training sessions and feedback provided. In addition, our consultants conduct supervised group discussions, exercises and role plays. The training approach is based on the principles of adult learning. Our methodology has several features that will ensure you experience a robust and relevant program; one that strengthens team dynamics and helps our clients deliver improved results. Some of the highlights of our unique approach are:

- ***Reduced Emphasis on Formal Training***

We base our course designs on the 70:20:10 paradigms. Research indicates that about 70% of what adults learn is through on-the-job experience, 20% through social learning, and 10% through formal training. We present information in ways that engage participants and generate plenty of discussion and sharing of experiences. We also provide individual and group assignments that encourage participants to integrate new concepts into their daily work.

- ***Practical and Relevant Content***

In assessing and designing course offerings, we remember Hermann Ebbinghaus' famous 'forgetting curve' that shows we forget 50% of learned material within one hour unless it is put into practice. Our needs analysis and instructional design practices produce engaging, real-world learning materials, customized so that participants relate fully with the content.

- ***Employing the Wisdom of Renowned Management Thinkers***

We employ the wisdom of renowned academics and authors on business and management like Henry Mintzberg who believes that:

- ✓ management should emphasize teamwork, rather than rely on heroic individualism
- ✓ effective staff are reflective in the context of taking action
- ✓ management development works best as social learning in small groups

- ***Research-supported Methods***

Our training delivery is always informed by research on adult learning principles and by our experience as organizational development consultants, instructional designers and facilitators. Consequently, we include plenty of opportunities for learners to apply key concepts, using scenarios and simulations, personal action plans, accountability partners, and other techniques. These methods ensure participants retain what they have learned, apply what they have learned quickly, refine their approach, and internalize learning for long-term use.

- ***Uncommon Focus***

Few training firms follow good design principles consistently because it takes time,

sustained focus and clarity. Compared to other strategies and methodologies, DGMB training will:

- ✓ Help you build strong internal communities
- ✓ Help staff learn more rapidly
- ✓ Build in lasting change through reflection

PROPOSED WORK PLAN

Our proposed work plan is laid out below. Our work plan has been intelligently designed to ensure achievement of the objectives of the training exercise. Given the expectations of your organization, our team of facilitators will adopt a practical and experiential approach. The training day will consist of Three (3) sessions of two (2) hours each and will be co-facilitated by 2 experts for the five days.

COURSE DURATION

The course duration is **five (5)** days that will run as per our proposed 5-day training programme. The length of the training is adequate to cover the entire course as shown in the timetable and course programme below.

COURSE CONTENT AND TIMETABLE

Find below the proposed content for this training:

DAY ONE	
8:00 am – 9:00 am	Arrival, Registration and Climate Setting
9:00 am – 10:30 am	Overview of Investment Management
10:30 am – 11:00 am	Mid-morning Break and Refreshments
11:00 am – 1:00 pm	Factors Influencing Investments by Firms <ul style="list-style-type: none">• Interest rates• Economic growth• Confidence• Inflation
1:00 pm – 2:00 pm	Lunch Break
2:00 pm – 4:00 pm	Factors Influencing Investments by Firms <ul style="list-style-type: none">• Productivity of capital• Availability of finance• Wage costs

	<ul style="list-style-type: none"> • Depreciation
4:00 pm – 4:15 pm	Coffee/Tea, Wrap Up & End of Day One
DAY TWO	
8:00 am – 8:30 am	Arrival, Registration and Climate Setting
8:30 am – 10:30 am	Types of Financial Investments <ul style="list-style-type: none"> • Shares • Bonds • Treasury bills • Options • Annuities • Certificate of deposit • Credit default swaps • Collateralised debt obligations
10:30 am – 11:00 am	Mid-Morning Break and Refreshments
11:00 am – 1:00 pm	Types of Financial Markets or Exchanges <ul style="list-style-type: none"> • Stock market • Bond market • Forex market • Derivatives market • Money market • Commodity market • Spot market • Real estate market
1:00 pm – 2:00 pm	Lunch Break
2:00 pm – 4:00 pm	Types of Investment Strategies <ul style="list-style-type: none"> • Passive and active strategies • Growth investing • Value investing • Income investing • Types of Investment Strategies • Dividend growth investing • Contrarian investing • Indexing
4:00 pm – 4:35 pm	Coffee/Tea, Wrap Up & End of Day Two
DAY THREE	

8:00 am – 8.30 am	Arrival, Registration and Climate Setting
8:30 am – 10:30 am	Methods of Property Investment Management <ul style="list-style-type: none"> • Real estate investments for rent • Investment management by real estate investment groups • Real estate trading • Investment management through real estate investment trusts
10:30 am – 11:00 am	Mid-Morning Break and Refreshments
11:00 am – 1:00 pm	Types of Companies and Stocks and Their Selection Process <ul style="list-style-type: none"> • Growth companies • Defensive companies • Cyclical companies • Speculative companies
1:00 pm – 2:00 pm	Lunch Break
2:00 pm – 4.00 pm	Overview of Global Bond Markets <ul style="list-style-type: none"> • Description • Types • Participants • Distinction
4:00 pm – 4:35 pm	Way Forward, Wrap Up & End of Day Three
DAY FOUR	
8:00 am – 8.30 am	Arrival, Registration and Climate Setting
8:30 am – 10:30 am	Factors Influencing Pension Plan Investments <ul style="list-style-type: none"> • Knowledge of plans and schemes • Investment tradition • Self-incentives (defined benefit versus defined contribution)
10:30 am – 11:00 am	Mid-Morning Break and Refreshments
11:00 am – 1:00 pm	Factors Influencing Pension Plan Investments <ul style="list-style-type: none"> • Legal and regulatory factors • Global financial regulation • Risk mitigation tools • Income growth • Unemployment rate
1:00 pm – 2:00 pm	Lunch Break

Learn. Internalize. Apply



2:00 pm – 4.00 pm	Steps in Investment Performance Measurement <ul style="list-style-type: none">• Benchmark selection• Calculation of the portfolio's excess return• Performance attribution• Risk analysis
4:00 pm – 4:35 pm	Way Forward, Wrap Up & End of Day 4
DAY FIVE	
8:00 am – 8.30 am	Arrival, Registration and Climate Setting
8:30 am – 10:30 am	Emerging Trends in Investment
10:30 am – 11:00 am	Mid-Morning Break and Refreshments
11:00 am – 1:00 pm	Emotional Intelligence
1:00 pm – 2.00 pm	Way Forward, Wrap Up & End of Training

YOUR INVESTMENT

We shall offer this training at a professional fee of **Kshs 92,500 per person excluding VAT** for the entire duration of the course. This fee will cover our charges, costs of course preparations and training materials. This cost does not cater for transport and accommodation for participants.

ADMINISTRATION DETAILS

Dates: 9th to 13th January 2023

Time: 8:00 a.m. – 5:00 p.m.

Venue: Sun Africa Beach Resort (Cocoa Boutique Hotel), Mombasa Attire: Smart Casual

For Enquiries call David or Josephine on: (+254) 722 352 680/0787 352 680

Email: training@dgmbtraining.co.ke or dgmbfinance@gmail.com

PRE-REQUISITES

No prior knowledge of Investment Management is required.

QUALITY ASSURANCE

DGMB Training Solutions Ltd strives to provide you with the most productive, effective and value for money training experience possible. If after completing the course you feel there is some way we can improve, please write your comments on the evaluation form provided upon your arrival.

TERMS AND CONDITIONS

Disclaimer: All registrations are subject to session availability. All speakers, sessions and prices were confirmed and correct at the time of printing. DGMB Training Solutions Limited reserves the right to change speakers and program details as required in addition to making changes to the schedules, venue or cancel the event altogether.

Privacy notification: DGMB Training Solutions Limited respects the privacy of individuals, their sponsors, Organizations and acknowledges that the information you provide on registration form is confidential and third parties would not have access to. DGMB Training Solutions Limited collects this information for purposes of processing your registration and providing you information (via email and/ or mail) on upcoming events, specific products and services provided by or associated with DGMB Training Solutions Limited. Kindly register by 5pm, two working days prior to the training to enable us to cater for your course materials and catering requirements.

Notice of withdrawal: Unless written notice of withdrawal is received before the closing date of the programme, the full fee is still due in the event of non-attendance. However, DGMB Training Solutions Limited accepts replacement(s) or substitution, made in writing, prior to the programme's commencement date. However, no substitution of participant(s) is allowable after the commencement of the training.

NITA ACCREDITED CERTIFICATE OF PARTICIPATION

At the end of the In-house Training, Certificate of Participation, will be awarded to all those who successfully complete the course.

HOW TO PAY

1. Issue a Cheque in the name of "DGMB Training Solutions Ltd" or
2. Remit the Training fees via RTGS or Electronic Funds Transfer (EFT) to our Bank, the details are: - Account Name: - DGMB Training Solutions Limited, Bank: Cooperative Bank of Kenya, Branch: City Hall Branch, Nairobi, Account Number: - 01148231039600 and Branch Code: - 11049.
3. Our PIN is P051349463P