

SEYA CAPITAL
INSIGHT · STRATEGY · GROWTH

TREASURY & INVESTMENT MANAGEMENT

Certified Investment Manager

Mastering Contemporary Strategic Investment Management

SECTOR	FORMATS	FEE FROM	2027 SESSIONS
Treasury & Investment Management	2 weeks	US$ 3,780	3

OVERVIEW

About this course

Strategic investment management is one of the most important factors determining the long-term performance of any investment. In a rapidly changing investment environment shaped by volatile markets, pandemics, technological disruption, and frequent financial crises, it is vital to understand the emerging drivers of securities, REITs (residential, commercial, and industrial), new projects, new companies, other assets, and, more recently, sustainable investment. Selecting the right investment management strategy is crucial to maintaining a resilient portfolio in today's volatile market.

This Seya Capital Certified Investment Manager training course gives current and prospective investors and financial analysts a unique opportunity to understand contemporary investment strategy. It reveals the strategies that consistently beat the market, including momentum trading and contrarian investing. Delegates will also learn about active and passive management techniques, how to use derivatives to protect their portfolios, how to develop key performance indicators, fundamental indexation, how to identify high-growth sectors, and how to read market sentiment. This training course is pitched to both individual and institutional investors.

This Seya Capital Certified Investment Manager training course will highlight:

- The current investment environment and asset allocation strategies
- Inefficient markets

- The application of financial derivatives
- Portfolio management and performance measures
- Recent developments and personal finance

2027 SCHEDULE

Dates, venues & fees

DATES	VENUE	FORMAT	FEE PER DELEGATE
8 – 19 Mar 2027	Dallas, Texas, USA	2 weeks	**US$ 6,660**
22 Mar – 2 Apr 2027	Port Elizabeth, South Africa	2 weeks	**US$ 4,770**
5 – 16 Apr 2027	Arusha, Tanzania	2 weeks	**US$ 3,780**

Fees exclude travel and accommodation. This course is also available in-house, on dates and at a venue of your choice.

OBJECTIVES

By the end of the course

This training course is designed to give you up-to-date knowledge and practical skills in investment management. By the end of this Seya Capital Certified Investment Manager training course, you will learn to:

- Demonstrate competence applying modern portfolio theory to security analysis and portfolio management in the real world
- Use a range of financial instruments, including derivatives, to hedge, speculate, and take advantage of market arbitrage situations
- Construct portfolio management strategies using a variety of assets and derivative instruments
- Demonstrate the application of techniques involved in portfolio management and strategic development
- Demonstrate an understanding of the role of investment companies in portfolio management, and the techniques used in portfolio performance evaluation
- Demonstrate an understanding of current market dynamics

WHO SHOULD ATTEND

Designed for

This Seya Capital Certified Investment Manager training course is relevant to anyone involved in, or planning to join, investment decision-making — including private individuals, financial and non-financial institutions, non-profit organisations, and government. It is suitable for a wide range of professionals, and will greatly benefit:

Financial Accounting Team Members | Financial Planning and Budgeting Professionals | Strategic Planning and Head Office Team Members | Corporate Communication and Investor Relations Professionals | Investment Analysts and Advisers | Traders | Investors in general

PROGRAMME

Course outline

Day 1: The Current Investment Environment and Asset Allocation Strategies

- Investment opportunities
- Required rate of return
- Sustainable investment strategies
- Risk and return
- Portfolio theory
- Capital market theory
- Asset pricing models

Day 2: Inefficient Markets

- The Efficient Market Hypothesis
- Market anomalies
- Environmental finance
- Behavioural finance
- Equity valuation models
- Extreme portfolio selection: momentum and contrarian trading
- Financial crises and pandemics
- Noise trading

Day 3: Application of Financial Derivatives

- Bond pricing
- Interest rate risk management
- Derivative instruments: forwards, futures, and options
- Fixed income portfolio management
- Passive bond portfolio strategies
- Matched-funding techniques
- Active bond management strategies
- The buy-write strategy

Day 4: Portfolio Management and Performance Measures

- Passive equity portfolio management strategies
- Active equity portfolio management strategies
- The top-down investment process
- Strategic asset allocation
- Tactical asset allocation
- Style investing: value versus growth
- Hedging portfolios
- Islamic and conventional fund management

Day 5: Recent Developments and Personal Finance

- Brexit
- Multilateral trading systems
- The financial consequences of terrorism
- Natural disasters and financial markets
- Energy markets
- Personal finance

METHODOLOGY

How you will learn

This training course is structured as a highly participative workshop, combining formal presentations, the latest research articles, interactive worked examples, and simulations. Relevant examples and empirical studies illustrate the application of each topic, with opportunities throughout to learn and apply key investment strategies.

IMPACT

The return on learning

For your organisation

- Up-to-date knowledge of current market dynamics
- Development of skills in critically analysing and interpreting financial innovation and risk
- Raised awareness of new financial opportunities
- The ability to build a winning portfolio
- Advanced practical skills in financial forecasting

For you

- A deeper understanding of how financial markets operate
- The ability to make financial decisions in a volatile market
- A good understanding of existing and upcoming financial products
- A better understanding of current market trends
- Stronger knowledge of financial management

CERTIFICATION

Seya Capital certificate

Upon successful completion of this classroom-based training course, delegates will be awarded a Seya Capital Certificate.

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Register or enquire

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