



**West Africa Business School**

*...Democratizing knowledge that links business with intelligence*

*In collaboration with*



**Corporate Training  
International Limited**

**PRESENTS**

**A 3-Day Training on**

**BEST INVESTMENT OPTIONS, ASSET  
MANAGEMENT AND RISK MANAGEMENT  
STRATEGY MASTERCLASS**



***Drawing on the extensive experience and expertise of our course instructors, our investment management courses are always relevant and practical.***

**Date:** 28 – 30 July 2021 | **Venue:** NECA House, Plot A2, Hakeem Balogun Street, Alausa Ikeja

**WELCOME • AKWAABA • BIENVENUE**

## Overview

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Having more money isn't what separates institutional and individual investors. The world is full of investors who scored a big win and then gave it all back because they overestimated the need for strategic complexity. The basics are just as relevant whether you're responsible for a N1,000 practice account or a N100,000,000 pension fund. Do you understand your basic liquidity needs, asset allocation, risk tolerance, personal ability and time constraints? Do you really understand the risks in your portfolio? These are the factors that should inform your strategy, whether you are an institution or an individual. The way you implement your strategies may differ slightly, depending on your resources and capabilities.

When it comes to the best investment options in Nigeria, a lot of questions pop up in the mind of people. Every investor wants to invest in the best investment options in Nigeria in a way that they can avail maximum returns in a specific tenure with minimum risk involved. Some people invest because they need financial security, whereas others invest to achieve their investment goals for gains or for statutory purposes. The investment options you should choose depends on your risk appetite, investment horizon, financials goals, and liquidity needs.

This is the reason why smart investors are always on a look out for the best investment options in Nigeria, where they can multiply their money in a specific time frame with minimum or no risk involved. However, it is hard to find an investment plan, which comes with a combination of high returns and low risk.

In reality, the returns and risks are directly proportional to each other, which means the higher the risk involved, the higher the chances of returns will be. While choosing the investment plan, it is inevitable to march the risk profile of the investor with the related risk of the product before investing. There are some investment plans in the market which includes high risk but also have the potential to gain profitable returns in the long-term as compared to other asset classes. On the other hand, some of the investment options include lower risk, but the returns are also low.

By gaining knowledge through expert insights about the best investment options in Nigeria, you would ultimately achieve your financial goal and also create a financial cushion for the future to secure your life as an individual or sustainable growth of a profit-driven institution.

## Course Objectives

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This course on best investment options, asset management and risk management strategies is designed for investment officers, managers and other multi-sectoral professionals who wish to learn how to apply modern portfolio and asset allocation techniques to generate superior investment performance.

The course starts by placing the professional investment management role within the broader financial services industry. Key investment vehicles and clients are discussed and the services they require from investment management firms are isolated. The process of investment management is explored using a case study before the course turns to the asset classes and instrument that are used to construct investment portfolios. Risk and return, along with common industry measures of each, are the key technical topic of the learning. During the final session, participants experience the role of the investment management professionals during challenging times, where they invest client money against a backdrop of a changing macroeconomic climate.

## Key Learning Outcomes:

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At the end of this investment training programme, participants should be able to:

- Explain the differences Between Institutional and Individual Investors
- Discuss core client groups of the investment management industry
- Describe the investment management process
- Apply the fundamental concepts and tools of investment.
- Apply investment management concepts and tools to the decisions faced by a manager in investment decisions.
- Explain equity, bond and alternative investment management tools and techniques
- Navigate of the world of investment analysis.
- Construct an efficient equity portfolio in a world of volatile global markets.
- Discover the secrets of “endowment style asset allocation” and their longer term top decile returns.
- Master risk management and downside protection of investment portfolios.
- Explain newer asset classes coming mainstream: hedge funds, private equity, commodities and real estate investment trusts (REITs) as an evolving asset class.
- Appraise the risk profile of firms; specifically, estimate the costs of capital, including debt and equity capital using financial data.
- Discuss the operations of three distinct capital markets: the equity market, the bond market and the derivatives market, and the financial assets traded in each of these markets.
- Explain the global financial environment and the globalization process experienced by multinational corporations.
- Detail relevant asset classes for investment
- Define performance metrics of investment funds
- Confidently communicate the definition of technical words and phrases found within the investment management industry

## Who Should Attend

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The course is designed for investment officers, managers and other multi-sectoral professionals in investment roles in their organisations. Entry-level officers that wish to develop a broad understanding of the investment management industry and the role that it plays in today's markets. This course will also be of particular benefit to those starting within the investment management industry and those that deal with the financial services industry.

## Methodology:

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The training session is designed to allow maximum delegate interaction, and it encompasses lively and interactive ‘discussion’, rather than a formal lecture type session. Approach: Work-shop style, subject-matter expert presentation, group discussion, participative contributions.

## COURSE OUTLINE / AGENDA:

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The course works to provide participants with a full and detailed overview of the investment management industry. Over the course of 3 days, delegates will engage in formal lecture and case study exercises to gain an understanding of the following:

## **Day 1 – Fundamentals of Investment**

1. The Differences Between Institutional and Individual Investors
2. Understanding the capital market; Bond-(US treasury and others, Eurobonds , Local Bond, corporate bond) and Stock markets
3. Understanding the money market (Treasury bills, commercial paper, repos...)
4. An overview of major alternative markets (commodities, crypto...)
5. Key Macroeconomics for Investors
  - Major macroeconomic indicators (leading and lagging indicators) and outlooks
  - Impact of regulatory environment (monetary and fiscal policies) on investment
  - Influence of International agencies; IMF, World Bank, OPEC, WHO (due to pandemic)
6. Concept of Investment Strategies ...
  - Active and/or Passive strategy
  - Short and/or long position
  - Local and/or foreign financial markets
7. Investment Risk Management strategies
  - Systematic risk/market risk/ Undiversifiable risk
  - Non-systematic risk/ idiosyncratic risks:
  - Headline risk

## **Day 2 – Creating a Winning Investment Strategy (WIS)**

1. The Fundamentals of Equity Market
2. Macroeconomic Dynamics of Fixed Income Market
3. Role of Derivatives in Hedging Investment Risks
4. Investment Strategies for Asset Management Process
5. Financial markets during Recession (advanced economies) and Stagflation (developing markets); Opportunities and threats
6. Winning investment strategy options in 2021
7. Top 10 investment avenues to look at while investing and/or saving for their financial goals.

## **Day 3 – Asset Classes for Investment**

### **1. Language and jargon of the major asset classes**

- Features of equity
- Features of bonds
  - Government
  - Corporate
- Features of foreign exchange
- FX Spot, Forwards, Futures markets on the FMDQ Securities Exchange

### **2. Risk and Return**

Clients are buying risk and return from the investment management industry.

- Modern portfolio theory
- Assessing portfolio performance
- Measurement of risk and return
  - Sharpe ratio
  - Information ratio
- Investment products

### 3. Investment Simulation

Participants will experience the role of active fund manager. Participants are split in groups and have 100m of client money to invest over three periods. They are given macroeconomic and market information and asked to invest using a small number of equity and bond securities. Performance of each group is assessed after each period.

#### COURSE FEE

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The course fee is structured in a way to make it affordable to companies/ organisation and also easy to make payment for all delegates as follow:

##### 1. Nigerian Residents / Participants:

- **Early-Bird Price** – N100,000.00 per person (Book & Pay Before 26<sup>th</sup> July 2021)
- **Group Price** – N85, 000.00 per person for 2 or more persons from one company / organisation (Book & Pay before 26<sup>th</sup> July 2021)

##### 2. African Countries/ Foreign Participants:

- **Early-Bird Price** – US\$250 per person (Book & Pay Before 26<sup>th</sup> July 2021)
- **Group Price** – US\$300 per person for 2 or more persons from one company / organisation (Book & Pay before 26<sup>th</sup> July 2021)

##### The course fee covers the following:

- Three full day's quality F2F or virtual training.
- PDF take-away handout material.
- Lunch, Tea/coffee breaks and refreshments daily,
- Printed course notes or Flash drive loaded with course notes or both,
- Leather seminar folder,
- Certificate of attendance
- Digital video recording of event. (*Subject to availability*).

##### NOTE:

- Early bird fee applies to registration and payment made on or before 30 June 2021
- Registration & payment of course fee must be received by closing date to enable organizers list the delegate/participants in the appropriate programme brochure.
- The course fee does not include VAT, hotel accommodation, airfare and dinner.
- Participants are therefore expected to be responsible for their respective airfare, accommodation and dinner where necessary.

#### HOW TO MAKE PAYMENT OF COURSE FEE:

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**1. Nigerian Residents / Participants** can make payment of course fee in local currency by Bank draft, e-transfer or Cash deposit issued in favour of West Africa Business School and paid to A/c No. 1014282576@ Zenith Bank Plc. Sort Code: 057150534.

**2. African Countries Participants** should make payment of course fee by *swift transfer* to this account details:

**Beneficiary:** West Africa Business School

**USD Account Number:** 5070520959

**Bank Name:** Zenith Bank Plc

**Swift Code:** ZEIBNGLA

**Bank Address:** Plot 84 Ajose Adeogun Street, Victoria Island – Lagos

## HOW TO REGISTER FOR THE COURSE

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Registration online or send names of your participants by email to: [wabs.edu@gmail.com](mailto:wabs.edu@gmail.com) and copy [info@westafricabusinessschool.com](mailto:info@westafricabusinessschool.com). You can also call and talk to the Programme Manager on Tel: +2348027922649, +2348143002943 by 8.00am – 5.00pm Monday - Friday.

### MEET THE COURSE LEADERS

#### **Robert Omotunde**

Chief Investment Officer at Afrinvest Asset Management Limited

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Robert is an Investment Research professional with focus on Nigerian Financial Market and the West African sub-region. Functions include but not restricted to financial modelling, financial analysis, equities and fixed income research, general economic dynamics and analysis as well as equities and bond valuation.

#### **Arvind Mathur**

Chairman, Private Equity Pro Partners

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Arvind is a pioneer of private equity and venture capital in the Asia-Pacific region. While at the Asian Development Bank, he helped bring major institutional investors to Asia including CalPERS, CDPQ, AMP and several American and Japanese insurance companies in innovative and creative private equity fund structures. As the President of The Indian Private Equity & Venture capital Association (IVCA), he promoted best practices and reforms in private equity and venture capital. He has rubbed shoulders with leaders like KKR, Sequoia, HDFC Property, TVS Capital, Barings and many other funds, to promote best practices in private equity, buyouts and venture capital and help bring about reforms. He is a member of the Securities & Exchange Board of India's (SEBI) ,Narayanmurthy-led Committee on Alternative Investment Funds along with KKR,TPG, Carlyle and others. Arvind mentored a start-up entrepreneur under a Goldman Sachs entrepreneurship program. He has over 25 years' global experience in private equity, venture capital, IPOs, mergers & acquisitions and investments. He led a team of multinational professionals in managing a portfolio of direct investments and over 30 private equity and venture capital funds at the Asian Development Bank. He has exposure to investments in many Asian countries, besides India and China. He engineered several exits. At Citi he helped structure a US \$ 1 billion private equity fund. His experience spans all stages of private equity including due diligence, valuation, fund formation, mobilizing Limited Partner (LP) commitments, making drawdowns, identifying and negotiating investments, adding value to funds and portfolio companies and exiting by a variety of methods including strategic sales, sales to other LPs , IPOs and other funds. His investment banking role included M&A & IPOs at Citi & ADB. An FRM & a CFA Charterholder, he has attended executive education in private equity and hedge funds at the Harvard Business School, training at Cambridge, Mass. & in New York at Goldman Sachs and Citi and at the U.S. SEC in Washington D.C.

## About the Organizers

### About WEST AFRICA BUSINESS SCHOOL (WABS)



WABS was established in response to the need for a high-quality professional development, corporate training and executive education institute to address the needs of working professionals who have the desire to continue professional and academic training while remaining in the workforce. The school was formerly registered on 7th May 2002 with the Nigeria Corporate Affairs Commission (RC.1652834) as a private regional training institution. In the beginning, West Africa Business School started with organizing corporate seminars, workshops and soft business short courses.

In January 2010, the school launched specialized strategic business conferences, leadership programme and management training courses across Africa focusing mainly on the financial services industry. Today, West Africa Business School (WABS) has become a house-hold name and a global brand, well known in Africa for delivery of world-class Corporate Training, Government Human Capital Development, Professional Education, Executive Education, Business Intelligence and Research Services. WABS proclaims that learning and development of human capital consolidates the structure of organizations worldwide. It ensures intelligent strategic action at every level, and gives individuals the tools and awareness to hone that strategy. With continuous learning, leaders of organizations **make world-class expertise an integral part of that organisation**. Instead of relying on outside support, you enhance the capabilities of your managers and leaders to address challenges. And by exposing senior people to leading edge-thinking, you ensure your business has the strategic drive to succeed. WABS provides corporate training, skill development, research information and consultancy services. WABS has very unique specialist individual and corporate training programmes that are practically challenging and rigorous, drawing on the strengths of the school's first-class faculty of world-renowned scholars, business managers and management development consultants of repute. WABS research into the latest business challenges existing in all corporate sectors in Africa, both old and new from everywhere to reach everyone involved in the subject matter. We then transform the idea into reality by creating business meetings, which bring people together to learn, network and progress. WABS offers corporate training short courses specializing in industries such as: *Financial Services, Energy (Oil & Gas, Power, Water), Telecoms, Manufacturing, Transport & Logistics, Hospitality & Healthcare, Government Ministries, Departments, Agencies and much more*. The WABS is registered and recognized by important government regulatory institutions such as Federal Ministry of Education, Federal Ministry of Justice, Corporate Affairs Commission (CAC), Industrial Training Fund (ITF) and accredited by Centre for Management Development (CMD) as a management training institution in Nigeria. Also, WABS Director General/Chief Executive Officer has attended various government approved training programme of the Centre for Management Development (CMD) in compliance with regulatory requirements.

### About Corporate Training International Limited (RC 1541091).

"The Human Capital Development Company"



We are a Top-Class Human Capital Development Service provider in Nigeria and West Africa. Our prime objective is to enable organisations access tomorrow's thinking and today's best practices in people management. People are the greatest assets of any organisation. Rekrut Consulting is dedicated to designing and delivering Training interventions to meet specific needs of client organisations in order for them to be competitive and contemporary. Our goal is to provide continuous improvement in the Skills, Knowledge & Attitude of young managers.

@ Corporate Training International Limited

- We are TRAINING providers.
- World-class Training Facilitators.
- Well Researched & Rich Content.
- Perfect Environment for Learning.
- Dynamic Teaching Methods.
- Our learning solutions are adaptable to groups of all sizes.
- Open and in-plant COURSES.

■ We are flexible to facilitate training sessions for your teams wherever you are located. Distance is not a barrier.

Our Service Offering:

- TRAINING/COURSES
- RECRUITMENT/EXECUTIVE SEARCH
- CONSULTING

**Further enquiry in respect of this course should be addressed to:**

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Director General

**West Africa Business School**

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Managing Director / Chief Executive Officer

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