ASISA ACADEMY

INVESTMENT MANAGEMENT BUSINESS OVERVIEW BLITZCAMP

BROCHURE

NOVEMBER 2025

1. ASISA ACADEMY VISION & TRACK RECORD

The ASISA Academy creates and delivers high quality solutions to meet the skills development needs of South African Savings, Life Assurance and Investment Management organisations. The Academy resulted from the need for a fresh approach to developing savings and investment management skills and achieving broader, more rapid transformation of the industry using an approach that responds to industry realities and is delivered by industry experts in an academically sound manner.

More than 24,000 people in the Southern African financial services sector have learned with the ASISA Academy since 2008 with over 1000 industry presenters keeping the learning rooted in reality. The Academy has a Level 1 B-BBEE rating. The ASISA Academy creates and delivers high quality solutions to meet the skills development needs of South African Savings, Life Assurance and Investment Management organisations. Our learning solutions are informed by and responsive to industry realities, delivered in an academically sound and practitioner-led manner. The Academy resulted from the need for a fresh approach to developing investment management and life insurance skills and achieving broader, more rapid transformation of the industry.

2. THE PURPOSE OF THE BLITZCAMP

An introduction to the investment business industry providing a broad overview of how an investment management business is structured and the workflow through the firm. This Blitzcamp builds on the foundational learning from the Financial Services Industry Overview Blitzcamp showing delegates how investment research, portfolio management, dealing, administration, governance and technology fit together at an investment management firm. It also considers how the firm interacts with other industry players such as stockbrokers, the JSE and other exchanges, STRATE and outsourced service providers.

3. APPROACH TO LEARNING

We work hard at the ASISA Academy to ensure every learning experience is as interactive as possible. To achieve this, we draw on the expertise of some of the most experienced and specialised professionals in the industry and we limit the size of our groups. The following diagram captures the Academy approach to learning. We aim to achieve the bulk of our learning in the biggest circles.
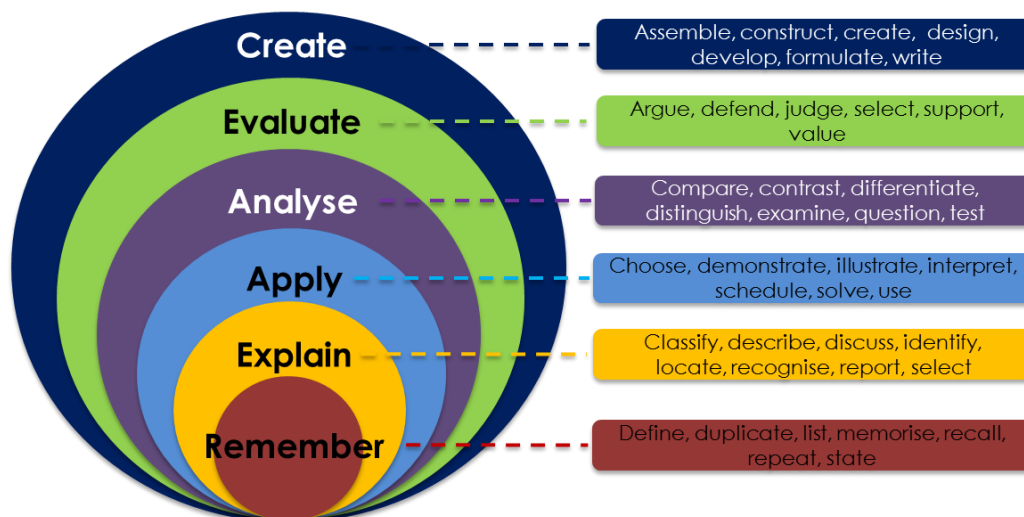
Class sizes are limited to enable a supportive learning environment in which no committed participant gets left behind. Delegates will be required to bring a laptop or tablet in order to make full use of the online learning environment during the sessions.

4. BLITZCAMP LEARNING OUTCOMES

TOPIC	LEARNING OUTCOMES By the end of the course successful delegates will be able to…
Flow of funds through to the Investment Manager	• Provide an overview of the investment product landscape.
Engaging with Clients	• Demonstrate the investment client engagement process including benchmarks, mandates and client reporting.
Investment process	• Show the processes of investment research, constructing & managing the portfolio.
Investment business structures	• Show the role players and relationships within the investment management landscape. • Examine the structure of the investment management firm. • Contrast the insourcing vs outsourcing of services.
Asset classes	• Equity overview incl. key equity activities (corporate actions and securities lending) • Interest Rate Instruments (Capital and Money Market) Derivatives
Pricing	• Demonstrate how to price both individual instruments and portfolios.
Performance conventions, analysis & reporting	• Show the different approaches to calculating and analysing performance • Apply the Global Investment Performance Standards (GIPS) in their contexts

5. OUR PRESENTER

The topics will be delivered by the following presenters:

GRANT CLOETE
Bachelor of Commerce (BCom) Honours, Financial Analysis and Portfolio Management

Grant started his financial services career in 1998 at Old Mutual, where he worked in various roles across the organisation, eventually growing into the role of portfolio manager within an investment boutique at the Old Mutual Investment Group. In 2007, he joined Investec Asset Managers (now Ninety One). He joined Afena Capital in 2014 as a client manager, and in 2016, he became the CEO. Today, Grant is the founder of startup investment firm, Grand Canid – a firm that aims to make a significant and positive impact on the lives of the underserved.

6. FEEDBACK FROM PAST DELEGATES

Some comments from Academy delegates about their experience on our programmes…

"Today's session meant that I could consolidate everything that I had learnt over the days of the course. It has been very valuable. I am very excited about the knowledge I have gained. Great course!"

"This is much more (content wise and experience) than I expected. The enthusiasm of the lecturing/organising team is infectious."

"Great lecturers from the industry that has a wealth of knowledge to share. Thoroughly enjoyed it!"

"In a nutshell, the investment industry summed up in a week and getting top industry professionals to simplify complexity in our working environment was one of the most fulfilling things in my career. I am ready to apply all the concepts learned and continue to question status quo."

"What an educational and enjoyable week! I've learned a lot and can't wait for the next week to begin! Everything is run well from the time set aside for presentations to the contents of presentations."

"I think, for me anyway, that a huge part of the value of the course lies in the contacts made through the course – with leaders in the industry as well as colleagues grappling with the same issues."

"Great course, thank you for this wonderful opportunity! Can't wait for next course."

"The presenters were all extremely well prepared. It was fantastic to get the insights from all of the experienced individuals!"

7. CONTACT INFORMATION

For more information please contact the Academy via:

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