BLACKBIRD FOR TRAINING

Pensions Scheme Investment Toolkit

Amsterdam (Netherlands)

28 June - 2 July 2027

Pensions Scheme Investment Toolkit

Code: FA32 From: 28 June - 2 July 2027 City: Amsterdam (Netherlands) Fees: 5200 Pound

Introduction

The Pensions Scheme Investment Toolkit course is a comprehensive training program designed to provide participants with a deep understanding of how pension schemes function and how their funds are invested to ensure long-term sustainability and growth. It offers an in-depth exploration of pension scheme structures, investment frameworks, risk management techniques, and regulatory considerations that shape strategic decision-making. Participants will explore various pension investment models and learn to design, manage, and evaluate investment portfolios that align with scheme objectives and fiduciary responsibilities.

Course Objectives

- Understand the structure, objectives, and functioning of pension and retirement funds.
- Gain comprehensive knowledge of investment principles applied to pension assets.
- Develop analytical skills to assess performance, risk, and asset allocation strategies.
- Learn how to comply with regulatory requirements and governance standards for pension investments.
- Strengthen decision-making skills in designing and managing diversified investment portfolios.
- Master the use of performance metrics and reporting tools for continuous monitoring and optimization.

Course Outlines

Day 1: Overview of Pension Schemes and Investment Fundamentals

- Introduction to pension schemes and their role in long-term financial security.
- Types of pension schemes: Defined Benefit DB, Defined Contribution DC, and hybrid models.
- Understanding fiduciary responsibilities, funding goals, and actuarial principles.
- Fundamentals of investment theory and its application to pension management.
- Linking liabilities and asset allocation in pension fund design.

Day 2: Asset Classes and Investment Strategies for Pension Funds

- Overview of traditional and alternative asset classes equities, bonds, real estate, infrastructure, private equity, etc..
- Strategic vs. tactical asset allocation.
- Diversification techniques and the role of global investments.
- Understanding yield, risk, and return profiles across asset types.
- Case studies of pension fund portfolios in various market environments.

Day 3: Risk Management and Governance

- Identifying and managing key risks: market, inflation, interest rate, longevity, and currency risk.
- Risk assessment models and hedging techniques e.g., duration matching, LDI - Liability Driven Investment.
- Governance and regulatory frameworks for pension schemes.

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- Roles of trustees, actuaries, fund managers, and investment consultants.
- Ethics and transparency in pension investment management.

Day 4: Performance Measurement and Reporting

- Developing performance benchmarks and KPIs for pension portfolios.
- Quantitative analysis and performance monitoring.
- Attribution analysis and identifying sources of return.
- Reporting requirements and best practices for stakeholder communication.
- Technology tools and dashboards for performance tracking.

Day 5: Building a Sustainable Pension Investment Framework

- Integrating ESG Environmental, Social, Governance principles into pension investments.
- Long-term investment strategies and emerging trends in pension fund management.
- Case studies of successful pension investment models.
- Developing a tailored Investment Policy Statement IPS.
- Group exercise: designing a model pension investment toolkit for a hypothetical scheme.

Why Attend This Course? Wins & Losses!

- Gain a complete understanding of how pension funds are structured, managed, and invested.
- Build practical skills to evaluate and select appropriate investment options.
- Strengthen knowledge in risk management, governance, and performance reporting.
- Learn international best practices through real-world case studies.
- Engage in hands-on exercises to design and evaluate pension investment frameworks.

Conclusion

The Pensions Scheme Investment Toolkit course provides a solid foundation for professionals involved in pension fund management, investment strategy, or regulatory oversight. From understanding pension scheme structures to mastering performance evaluation and sustainable investment, participants will develop the analytical and practical expertise needed to manage pension assets effectively, responsibly, and strategically for long-term growth.

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