

# Best Practices and Strategies for Public Investing Training Course

Professional Development Training Course Outline

|          |                                         |               |                         |
|----------|-----------------------------------------|---------------|-------------------------|
| Category | Public Financial Management & Budgeting | Duration      | 5 Days                  |
| Base Fee | \$1,500 USD                             | Delivery Mode | Online / On-site Hybrid |

## Course Introduction

Best Practices and Strategies for Public Investing Training Course provides a comprehensive roadmap for public sector professionals to master the complexities of managing public funds. The program focuses on **strategic asset allocation**, **robust risk management**, and **performance measurement**, ensuring participants can maximize returns while prioritizing the safety and liquidity of public assets. It delves into the **macroeconomic trends**, **regulatory compliance**, and **technological innovations** shaping the future of public finance, equipping attendees with the **advanced analytical skills** and **decision-making frameworks** needed to navigate a dynamic global landscape.

The training is designed to bridge the gap between traditional public sector financial management and the sophisticated demands of today's investment environment. It integrates **real-world case studies** and **interactive workshops** to provide a hands-on learning experience, moving beyond theoretical concepts to practical, **implementable strategies**. By the end of this course, participants will be able to develop and execute **sound investment policies**, evaluate and select **external asset managers**, and implement **cutting-edge technologies** to enhance transparency and efficiency, ultimately fostering **sustainable fiscal health** for their organizations.

## Programme Curriculum

### Best Practices and Strategies for Public Investing Training Course

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### Course Duration

5 days

### Course Objectives

- Master **public funds portfolio management** and **asset allocation** best practices.
- Develop **robust risk management frameworks** for public sector investments.
- Evaluate and select **external investment managers** and consultants.
- Implement effective **performance measurement** and **benchmarking** techniques.
- Understand the legal and **regulatory compliance** landscape for public funds.
- Formulate a **public investment policy** aligned with organizational goals.
- Analyze **macroeconomic trends** and their impact on investment decisions.
- Utilize **data analytics** and **fintech** for informed decision-making.
- Apply principles of **sustainable and responsible investing (SRI)**.
- Conduct thorough **due diligence** on investment opportunities.
- Manage **cash flow forecasting** and liquidity needs effectively.
- Enhance **internal controls** and governance for investment oversight.
- Build a **diversified portfolio** to optimize risk-adjusted returns.

### Organizational Benefits

- Improves the safety and return on public funds, leading to greater financial stability.
- Strengthens risk management capabilities, minimizing potential losses from market volatility and poor investment choices.
- Ensures adherence to legal and regulatory standards, building public trust and accountability.
- Equips staff with the analytical tools to make data-driven, strategic investment decisions.
- Streamlines investment processes and reporting through the adoption of modern technology and best practices.
- Aligns investment activities with long-term organizational objectives and economic development goals.

### Target Audience

- Government treasurers and finance officers
- Public pension fund managers
- Sovereign wealth fund analysts
- State and municipal finance staff

- Central bank officials
- Heads of public sector agencies
- Public-private partnership (PPP) specialists
- Financial regulators and auditors

## Course Modules

### Module 1: The Foundation of Public Investing

- Public Funds Mandates: Understanding the unique principles of safety, liquidity, and yield.
- Regulatory & Legal Frameworks: Navigating federal, state, and local government regulations.
- Investment Policy Development: Crafting a clear and compliant investment policy statement.
- Governance & Oversight: Establishing robust internal controls and reporting structures.
- **Case Study: The Orange County Bankruptcy:** Analyzing a historical failure to understand the catastrophic consequences of poor governance and policy.

### Module 2: Macroeconomics & Market Analysis

- Economic Indicators: Interpreting key economic data (GDP, inflation, interest rates).
- Fixed-Income Securities: Understanding government bonds, municipal securities, and other debt instruments.
- Equity & Alternative Investments: Evaluating the role of stocks and non-traditional assets in public portfolios.
- Market Risk Management: Identifying and mitigating credit, interest rate, and liquidity risks.
- **Case Study: The 2008 Global Financial Crisis:** Examining the impact of systemic risk on public pension funds and the strategies used for recovery.

### Module 3: Portfolio Construction & Management

- Asset Allocation Strategies: Designing diversified portfolios to meet specific objectives.
- Modern Portfolio Theory (MPT): Applying principles of diversification to optimize risk-return.
- Benchmarking Performance: Selecting and using appropriate indices to measure success.
- Rebalancing & Tactical Adjustments: Techniques for maintaining the target asset mix.
- **Case Study: Managing a State Pension Fund:** A hands-on exercise in constructing and rebalancing a multi-asset portfolio based on a realistic mandate.

### Module 4: Risk Management in Detail

- Credit Risk Analysis: Assessing the creditworthiness of issuers and counterparties.
- Interest Rate & Duration Risk: Tools to manage portfolio sensitivity to rate changes.
- Operational & Cybersecurity Risk: Protecting investment systems and data from threats.
- Quantitative Risk Metrics: Using Value at Risk (VaR) and other metrics to quantify exposure.
- **Case Study: The Collapse of Archegos Capital:** A deep dive into the risks associated with leverage and opaque financial instruments.

### Module 5: Investment Manager Selection & Oversight

- The Search Process: Defining criteria for selecting external asset managers.
- Due Diligence: Conducting comprehensive operational and investment due diligence.
- Fee Structures & Negotiations: Understanding and negotiating management and performance fees.
- Ongoing Monitoring: Establishing a framework for regular manager performance reviews.

- **Case Study: A City Pension Fund's RFP:** A practical exercise in creating a Request for Proposal (RFP) and evaluating manager presentations.

## Module 6: Sustainable & Impact Investing

- ESG Integration: Incorporating Environmental, Social, and Governance factors into the investment process.
- Impact Investing Strategies: Allocating capital to generate positive social or environmental outcomes alongside financial returns.
- Reporting & Disclosure: Communicating ESG and impact performance to stakeholders.
- Green Bonds & Social Bonds: Investing in debt instruments with specific sustainability purposes.
- **Case Study: A Public-Private Partnership in Renewable Energy:** Analyzing the financial and social returns of a large-scale sustainable infrastructure project.

## Module 7: Technology & Innovation in Public Investing

- Fintech for Public Funds: Leveraging technology for enhanced reporting, analytics, and trading.
- Blockchain & Digital Assets: Exploring the potential and risks of new technologies.
- AI & Machine Learning: Using artificial intelligence for predictive analysis and portfolio optimization.
- Cybersecurity Best Practices: Safeguarding investment platforms from digital threats.
- **Case Study: Implementing a New Treasury Management System:** A practical workshop on selecting and implementing technology to improve efficiency.

## Module 8: Advanced Public Investment Strategies

- Strategic vs. Tactical Asset Allocation: Differentiating long-term vs. short-term investment decisions.
- Derivative Instruments: Understanding and using futures, options, and swaps for hedging.
- Active vs. Passive Management: Evaluating the trade-offs between different investment styles.
- Stress Testing & Scenario Analysis: Preparing portfolios for adverse market conditions.
- **Case Study: Navigating a Recession:** A simulation where participants must adjust a portfolio to mitigate losses and capitalize on new opportunities during an economic downturn.

## Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

**Register as a group from 3 participants for a Discount**

Send us an email: [info@fineskilltrainingcenter.org](mailto:info@fineskilltrainingcenter.org) or call +254769199797

**Certification**

*Upon successful completion of this training, participants will be issued with a globally- recognized certificate.*

**Tailor-Made Course**

*We also offer tailor-made courses based on your needs.*

**Key Notes**

- a.** The participant must be conversant with English.
- b.** Upon completion of training the participant will be issued with an Authorized Training Certificate
- c.** Course duration is flexible and the contents can be modified to fit any number of days.
- d.** The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.
- e.** One-year post-training support Consultation and Coaching provided after the course.
- f.** Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

**Upcoming Scheduled Sessions**

| Start Date  | End Date    | Location | Price   |
|-------------|-------------|----------|---------|
| 21 Sep 2026 | 25 Sep 2026 | Online   | \$1,000 |
| 21 Sep 2026 | 25 Sep 2026 | Physical | \$1,500 |
| 21 Sep 2026 | 25 Sep 2026 | Physical | \$0     |
| 21 Sep 2026 | 25 Sep 2026 | Physical | \$0     |
| 21 Sep 2026 | 25 Sep 2026 | Physical | \$0     |
| 21 Sep 2026 | 25 Sep 2026 | Physical | \$0     |
| 21 Sep 2026 | 25 Sep 2026 | Physical | \$0     |
| 21 Sep 2026 | 25 Sep 2026 | Physical | \$0     |

Ready to enroll or request a customized program? Book online or contact us:

[Register Online Now](#)

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