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

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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?ÇÖs 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 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
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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