

 ASISA

ACADEMY

 NEWS FLASH

ASISA Academy Newsflash – March 2023

Dear Stakeholder

Growth and success can be measured in different ways. For the ASISA Academy, substantial growth in demand for our learning programmes is the most meaningful confirmation that our approach is working. When the growing demand comes from the same entity year after year, we are truly humbled.

In 2020, we were approached by the Office of the Auditor General for the first time with a request to deliver five bespoke online workshops to 85 delegates. We have been delivering bespoke online workshops to employees of the Office of the Auditor General every year since then. In March this year, another 285 delegates attended six bespoke online workshops.

This means that over the past four years, 633 employees from the Office of the Auditor General unpacked the following topics with us: Asset Management, Local and International Bonds, Investment Management, Infrastructure Investing, Private Equity, Introduction to Banking and Financial Services as well as Local and International Economics.

We thank the Office of the Auditor General for this significant vote of confidence and for partnering with us to provide a learning path for their employees.

NEWS FROM OUR GRADUATE PROGRAMME

Financial Markets Practitioner Learnership

The ASISA Academy's pilot [Financial Markets Practitioner \(FMP\) Learnership](#) concluded at the end of February 2023. This was a proud moment for the members of the ASISA Academy, who had dedicated several years to achieving institutional accreditation with the Quality Council for Trades and Occupations (QCTO) and revising this qualification specifically for the investment management industry. A feather in our cap was receiving the highest rating across all eight monitoring areas for the first iteration of the learnership from the QCTO verifier.

Delegates declared competent will write the external examination set by the South African Institute of Stockbrokers (SAIS) in April 2023.

The second iteration of the FMP Learnership kicked off on 7 March 2023. The eight female graduates participating in the Fezeka Graduate Programme are also participating in the current FMP Learnership.

Fezeka Graduate Programme

The young women participating in the [Fezeka programme](#) are in the second month of their first work rotation. They are adjusting well to their new corporate environments at their host employers. Over 15 months, the graduates will work at various host companies, while participating in the ASISA Academy's [FMP Learnership](#).

Fezeka is an exciting new industry collaboration aimed at helping the South African asset management industry improve the representation of Black women on investment teams. The Fezeka Graduate Programme is delivered by the ASISA Academy and business consultancy Joint Prosperity.

The investment management companies supporting Fezeka are Aeon Investment Management, Anchor Stockbrokers, Catalyst Fund Managers, Coronation Fund Managers, Foord Asset Management, Granite Asset Management, Mazi Asset Management, Meago Trading, Mentenova Consultants and Actuaries, Merchant West Investments, Old Mutual Multi Managers, Perpetua Investment Managers, PIC, PPS Investments, Sanlam Investment Management, SBG Securities, Stanlib, and Terebinth Capital.

We would like to call on more investment management companies to come on board and support this programme. I invite you to [contact me](#) to discuss how your company can get involved and what the benefits are.

RETIREMENT FUND TRUSTEE EDUCATION UPDATE

There was a strong demand for bespoke [Retirement Fund Trustee Education \(RFTE\)](#) workshops in March. We presented 16 workshops to more than 200 trustees and principal officers from the following retirement funds:

- UCT Retirement fund
- CR Fund
- Securities Employee National Provident Fund (SEMPF)
- Evangelical Presbyterian Church in South Africa Pension Fund (EPCSA)
- Germiston Municipal Retirement Fund
- CPUT Retirement Fund
- Telkom Retirement Fund
- Botswana Public Officers Pension Fund
- Political Office Bearers Pension Fund
- Liberty Cooperate
- eJoburg Retirement fund

There has been an increase in requests for in-person workshops. Six of the bespoke workshops were delivered in person, and feedback received from the delegates shows just how much the human interaction in a physical classroom setting was appreciated and enjoyed.

We also presented four public online [Retirement Fund Trustee Education \(RFTE\)](#) workshops to 50 trustees and principal officers from various retirement funds.



Delegates from the Security Employees National Provident Fund (SEMPF) who attended the Induction course for new retirement fund trustees in Johannesburg.

OTHER COURSES PRESENTED IN MARCH

- The following [Investment Sprints](#) were presented to Ninety One employees new to the asset management industry: Introduction to the SA Savings and Investment Sector, Investment Products and Structures, Fundamentals of Retirement Funds and Life Insurance, and Fundamentals of Equities Portfolio Management.
- The [UCT Collective Investment Schemes \(CIS\) Short Course](#) in Cape Town was attended by 13 delegates from various companies. The next course will run online in May and there are still a few spots available. Please enrol [here](#).
- For the first time, the ASISA Academy presents two [UCT Life Insurance Claims Assessors' Short Courses](#) in one year. The online course started in March with 14 delegates from various life insurance companies. The next course will be delivered face-to-face in Johannesburg from July to October. A limited number of seats are still available. Please enrol [here](#).
- We delivered the first two sessions of our new [Compliance Masterclass](#) series for experienced compliance professionals. In March, the following topics were covered:
 - Defining and driving compliance strategy
 - Designing and implementing compliance models and structures

Another five topics are scheduled from April to June. Each masterclass runs independently of the other, so feel free to sign up here for the remaining masterclasses.



Delegates who attended the UCT Collective Investment Schemes (CIS) Short Course in March 2023.

LEARNING OPPORTUNITIES IN THE SPOTLIGHT

Investment Sprints

- [Investment Management Business Overview](#) - 11 April 2023
- [Introduction to the SA Savings and Investment sector](#) - 14 April 2023
- [Investment Products and Structures](#) - 24 April 2023
- [Compliance - Prudential investment guidelines](#) - 26 April 2023

Equity Analyst Short Course

This course will be delivered online as a series of 10 half-day sessions during April. For more information and to enrol, please click [here](#).

Retirement Fund Trustee Education (RFTE)

- [Death Benefits](#) - 14 April 2023
- [Investment Management Fees & Costs](#) - 19 April 2023
- [Investment Policy Statement Formulation & Assessment](#) - 20 April 2023
- [Infrastructure Investing](#) - 21 April 2023
- [Masterclass in Death Benefits & Section 37C](#) - 21 April 2023
- [Basics of Alternate Investments](#) - 25 April 2023

For a complete overview of learning opportunities, please visit the [ASISA Academy Learning Calendar](#).

ASISA ACADEMY ON THE MOVE

Over the past three years, the ASISA Academy started outgrowing the space it shared with ASISA. We are, therefore, very excited to announce that we have moved to new premises. You will now find us on the first floor of Slade House, Boundary Terraces, in Newlands, Cape Town. In the April edition of Newsflash, we will share more information and some photos of our new home.

LEARN WITH US

The ASISA Academy is recognised as a Level 1 B-BBEE contributor, with more than 75% of the Academy's beneficiaries being black South Africans. This means employers can claim 135% of their skills development spend with the ASISA Academy. Please [get in touch](#) with us to discuss how we can support your skills development requirements.

Please visit our [website](#) for more information on our many learning opportunities. We also invite you to interact with us on [LinkedIn](#).

Best wishes

Alicia Davids
ASISA Academy CEO