Public Investment Strategy and Portfolio Governance Training Course

20 – 24 September 2027
Addis Ababa

AGILE LEADERS
Training Center

Public Investment Strategy and Portfolio Governance Training Course

Ref: 411_223629 **Date:** 20 – 24 September 2027 **Location:** Addis Ababa **Fees:** 4500 Euro

Overview

Public Investment Strategy and Portfolio Governance Training Course is a one-week advanced course for public fund leaders who leave with a Public Investment Strategy and Governance Pack. The course connects investment mandates, financial and public-value objectives, governance, strategic asset allocation, risk budgeting, liquidity, manager selection, responsible ownership, performance attribution, and transparency. Participants turn owner expectations into portfolio decisions and review evidence. Agile Leaders Training Center delivers this course on public investment strategy and portfolio governance.

Who Should Attend

- Public investment functions responsible for mandates, strategy, allocation, and portfolio decisions
- Investment committee functions responsible for challenge, approval, oversight, and review
- Risk functions responsible for risk appetite, limits, liquidity, concentration, and escalation
- Governance functions responsible for decision rights, independence, accountability, and transparency
- Manager oversight functions responsible for selection, mandates, monitoring, and termination decisions
- Finance and performance functions responsible for benchmarks, attribution, reporting, and owner communication

The course assumes participants already work with institutional investment, governance, finance, or risk decisions and leaves out retail investing, security valuation, infrastructure project appraisal, and trading tactics.

Departments and Industries

The course supports public investment strategy and oversight across institutional asset owners and public finance organizations.

- Sovereign wealth, stabilization, savings, development, and strategic investment funds
- Public pension, reserve, endowment, and social insurance asset owners
- Government finance, ownership, and fiscal-risk functions
- Investment strategy, portfolio management, and external-manager teams
- Risk, compliance, internal audit, and governance departments
- Advisory functions supporting institutional investment policy and reporting

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Learning Objectives

By the end of this course, participants will be able to:

- Build a mandate-to-portfolio decision chain
- Apply governance and decision-rights controls
- Evaluate strategic asset allocation and risk budgets
- Analyze liquidity, concentration, and manager evidence
- Use ownership and performance-attribution tools
- Build transparent strategy-review and accountability records

Course Agenda

Day 1: Mandate and Governance Architecture

- Owner Mandate and Objective Translation Map
- Financial and Public-Value Outcome Tree
- Investment Horizon and Constraint Register
- Board, Committee, and Management Decision-Rights Matrix
- Santiago Principles Governance Self-Assessment

Day 2: Allocation and Portfolio Construction

- Strategic Asset Allocation Policy Record
- Asset-Class Role and Return Driver Map
- Portfolio Diversification and Concentration Diagnostic
- Risk Budget and Limit Allocation Grid
- Liquidity Needs and Funding Capacity Map

Day 3: Implementation and Ownership

- Internal and External Management Decision Canvas
- Investment Manager Selection Scorecard
- Manager Mandate and Monitoring Framework
- Responsible Investment Policy Map
- Active Ownership and Voting Plan

Day 4: Performance and Strategy Review

- Policy Benchmark and Reference Portfolio Map
- Investment Performance Attribution Bridge
- Risk-Adjusted Outcome Dashboard
- Transparency and Stakeholder Reporting Matrix
- Investment Strategy Review and Rebalancing Protocol

Day 5: Public Investment Strategy Practice

- Suggested Exercise: Mandate and Governance Diagnosis
- Suggested Exercise: Allocation and Risk Budget Decision
- Suggested Exercise: Manager and Ownership Review
- Suggested Exercise: Attribution and Strategy Challenge
- Capstone Exercise: Public Investment Strategy and Governance Pack

Practical Exercises

The course uses suggested activities to connect public investment mandates with accountable portfolio decisions.

- Suggested activity: translate owner objectives, horizon, constraints, and public-value expectations into an investment mandate.
- Suggested activity: test an allocation against diversification, risk-budget, liquidity, and funding evidence.
- Suggested activity: compare internal and external management options and build a manager oversight scorecard.
- Suggested activity: attribute performance and present a documented strategy review and rebalancing decision.

FAQs

Who suits public investment strategy training, and what does it assume?

Public investment strategy training suits institutional asset-owner leaders and specialists who already work with investment, governance, risk, finance, or performance evidence.

How does public investment strategy differ from private wealth management training?

Public investment strategy connects an owner mandate, public accountability, institutional governance, portfolio scale, long horizons, and stakeholder transparency; private wealth management centers on the objectives and constraints of private clients.

What belongs in a public investment mandate?

A public investment mandate defines purpose, objectives, horizon, eligible investments, risk appetite, liquidity needs, constraints, governance, decision rights, reporting, and review expectations.

How should public funds evaluate strategic asset allocation?

Public funds should evaluate allocation against mandate objectives, horizon, return drivers, diversification, risk budgets, liquidity, funding needs, implementation capacity, costs, and adverse scenarios.

How should public investment performance be reviewed?

Public investment performance should be reviewed against policy benchmarks and mandate objectives, with attribution for allocation and implementation, risk-adjusted outcomes, liquidity, costs, ownership activity, and accountable decisions.

Conclusion

Participants leave with a Public Investment Strategy and Governance Pack containing a mandate map, governance charter, allocation record, risk budget, liquidity map, manager scorecard, ownership plan, attribution dashboard, and strategy review. The pack changes broad owner expectations into traceable portfolio decisions. It supports oversight, transparency, learning, and accountable adjustment.