

BEST PRACTICES AND STRATEGIES FOR PUBLIC INVESTING



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TRAINING CENTER



Introduction

Best Practices and Strategies for Public Investing Training Course prepares public sector finance and investment professionals to manage public funds with discipline and accountability. Participants work through investment policy design, asset allocation, portfolio management, risk governance, and performance measurement as one connected mandate. The programme links fiduciary duty with practical investment decisions under public scrutiny. As a result, learners gain a framework suited to public institutions rather than adapted from private fund practice. Furthermore, the course strengthens governance judgement, risk discipline, and the transparency that public investment requires.

Best Practices and Strategies for Public Investing Course Objectives

- Define the fiduciary duties and mandate of a public investment institution.
- Draft an investment policy statement (IPS) with objectives, constraints, and limits.
- Apply asset allocation principles across equities, fixed income, real assets, and cash.
- Apply Modern Portfolio Theory, the efficient frontier, and diversification logic.
- Assess risk using volatility, value at risk (VaR), and drawdown measures.
- Apply performance measurement with time-weighted and money-weighted returns.
- Benchmark portfolio performance with appropriate indices and peer comparison.
- Apply the Sharpe, Treynor, and information ratios to evaluate performance.
- Apply responsible investment and ESG principles in public portfolios.
- Build governance, reporting, and audit standards for public funds.

Course Methodology

- Interactive sessions built on public investment and sovereign fund cases.

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- Workshops on investment policy drafting, asset allocation, and performance review.
- Group exercises on risk analysis, benchmarking, and governance design.
- Hands-on practice with portfolio return calculations, risk measures, and IPS structures.
- Simulation of an investment committee review and a manager selection decision.
- Facilitator coaching and peer review on personal investment governance plans.

Who Should Take This Course

- Public sector finance and investment officers.
- Sovereign wealth fund and pension fund professionals.
- Treasury and reserves management staff.
- Investment committee members and board advisors.
- Risk, compliance, and internal audit professionals in public funds.
- Consultants advising governments on investment governance.

Best Practices and Strategies for Public Investing Course Outlines

Day 1: Public Investment Mandate and Fiduciary Duty

- What makes public investing different from private investing.
- Fiduciary duty, prudence, and accountability to citizens and oversight bodies.
- Types of public funds: sovereign wealth, pension, reserves, and endowments.
- Investment objectives, time horizon, and liquidity needs.
- Legal and regulatory framework for public investment.
- Conflicts of interest and ethical conduct standards.
- Case discussion: a public fund that lost sight of its mandate.





Day 2: Investment Policy and Asset Allocation

- Writing an investment policy statement (IPS).
- Return objectives, risk tolerance, and constraint definition.
- Strategic versus tactical asset allocation.
- Asset classes: equities, fixed income, real assets, and cash.
- Modern Portfolio Theory and the efficient frontier.
- Diversification, correlation, and portfolio construction.
- Workshop: drafting an investment policy statement for a public fund.

Day 3: Risk Management and Portfolio Analytics

- Types of risk: market, credit, liquidity, currency, and operational.
- Volatility, standard deviation, and beta measurement.
- Value at risk (VaR) and expected shortfall concepts.
- Drawdown analysis and stress testing.
- Currency hedging and interest rate exposure management.
- Liquidity planning and cash flow matching for public liabilities.
- Exercise: building a portfolio risk dashboard.

Day 4: Manager Selection, Benchmarks, and Performance

- Active versus passive management and the case for each.
- Manager selection, due diligence, and fee analysis.
- Benchmark selection and customised indices.
- Time-weighted versus money-weighted return calculation.

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- Performance attribution: allocation and selection effects.
- The Sharpe, Treynor, and information ratios explained.
- Simulation: an investment committee manager selection review.

Day 5: Responsible Investment, Governance, and Reporting

- ESG integration, screening, and stewardship in public portfolios.
- Climate risk and long-horizon investment considerations.
- Governance structures, delegation, and investment committee design.
- Custody, valuation, and third-party assurance.
- Transparency, disclosure, and reporting to the public.
- Building investment capability and succession.
- Capstone: presenting a public investment strategy and governance plan.

Conclusion

By successfully completing Best Practices and Strategies for Public Investing, participants will gain a practical command of investment policy, asset allocation, risk management, and performance evaluation for public funds. They will acquire skills in portfolio construction, benchmarking, manager oversight, and governance reporting that support accountable public investing. Gentex Training Center designs the programme to help professionals manage public money with discipline and transparency.

FAQs





Q1 What is the "Best Practices and Strategies for Public Investing" course about?

It prepares public sector finance and investment professionals to manage public funds with discipline and accountability. The course spans the public investment mandate and fiduciary duty, investment policy and asset allocation, risk management and portfolio analytics, manager selection, benchmarks and performance, and responsible investment, governance, and reporting.

Q2 What are the key benefits of the "Best Practices and Strategies for Public Investing" course?

You gain a framework suited to public institutions rather than adapted from private fund practice. The course improves investment policy and allocation discipline, strengthens risk measurement, sharpens performance evaluation and manager oversight, and gives you reporting standards that withstand public scrutiny.

Q3 What skills will I gain from the "Best Practices and Strategies for Public Investing" course?

You will develop four core skills: investment policy design and asset allocation, portfolio risk measurement and management, performance evaluation and manager oversight, and responsible investment with governance reporting.



Q4 What tools, methods, or standards are covered in the "Best Practices and Strategies for Public Investing" course?

The course covers investment policy statement (IPS) design, fiduciary duty and prudence principles, strategic and tactical asset allocation, Modern Portfolio Theory and the efficient frontier, diversification and correlation analysis, volatility and beta measurement, Value at Risk (VaR) and expected shortfall, drawdown analysis and stress testing, currency hedging, time-weighted and money-weighted return calculation, benchmark selection and customised indices, performance attribution (allocation and selection effects), the Sharpe, Treynor, and information ratios, ESG integration and stewardship, and governance, custody, valuation, and disclosure standards.

Q5 How is the "Best Practices and Strategies for Public Investing" course applied in real-world practice?

Participants apply it to real work such as drafting an investment policy statement for a public fund, building a portfolio risk dashboard, evaluating a fund manager's track record, and preparing a performance and governance report for an oversight body. The same methods support asset allocation reviews and climate risk assessment.