
Investment Fundamentals Training Course for Executives: Markets, Risk and Portfolios

2 – 6 May 2027
Zoom





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Programme Summary

Investment fundamentals is the subject of this one-week training course for senior executives and board members who oversee or approve investment decisions without a specialist background, ending in an investment policy brief for one pool of funds. Organisations place reserves, pension assets and surplus cash with managers and advisers, yet approvers often cannot test the risk, cost and return claims put to them. The programme moves from markets and asset classes to risk, return, portfolios, costs and oversight, using cases from corporate treasury and pension settings. Mars Training Centre UK delivers this programme on investment fundamentals to mixed-organisation cohorts.

The Business Case

Investment decisions are often approved on the strength of a presentation rather than a method. Without a shared vocabulary, approvers cannot compare options, question assumptions or see how fees and concentration change the outcome over time. A common framework gives senior teams a basis to set the purpose of a fund, define acceptable risk and hold managers to account in plain terms.

- Decision Quality: Improves as options are compared on risk, return and cost with one method.
- Investment Cost: Falls as fees, turnover and hidden charges are identified before approval.
- Risk Exposure: Falls as concentration and loss tolerance are defined in advance.

Principles and Evidence Base

- Risk and Return Principles: Show why higher expected return carries higher uncertainty, applied in Sessions 1 and 2.
- Diversification Principles: Explain how combining holdings changes overall risk, applied in Session 3.
- Time Value of Money Principles: Compare cash flows received at different dates, applied in Sessions 2 and 4.
- Investment Policy Statement Concept: Records purpose, limits and review rules for a pool of funds, applied in Sessions 4 and 5.

Intended Participants

- Senior executives who approve the placement of reserves, surplus cash or endowment funds.
- Board and committee members who oversee investment managers and advisers.
- Finance leaders who present investment proposals to governing bodies.
- Risk and internal audit leaders who challenge investment assumptions and reports.

Typical functions include corporate treasury, pension schemes, foundations and public bodies with reserves.



Learning Outcomes

1. Participants will be able to classify the main asset classes by return source, risk and liquidity.
2. Participants will be able to evaluate expected return and risk for a single holding using simple measures.
3. Participants will be able to construct a diversified portfolio outline that matches a stated purpose.
4. Participants will be able to diagnose the effect of fees and costs on long-term results.
5. Participants will be able to justify an investment policy position with limits, benchmarks and review rules.
6. Participants will be able to challenge a manager or adviser proposal using a structured question list.

Programme Structure

Day 1: Investment Fundamentals and Asset Classes

What are the main places funds can be invested, and what drives their returns?

- Asset Class Comparison Chart
- Return Source Breakdown
- Liquidity Ladder
- Investment Vehicle Map
- Market Structure Overview

Day 2: Risk, Return and Time

How are risk and return measured, and how does time change their value?

- Expected Return Worksheet
- Volatility and Loss Range Chart
- Time Value of Money Calculator
- Inflation and Real Return Adjustment
- Risk Tolerance Statement

Day 3: Portfolio Construction and Diversification

How does combining holdings change the risk a portfolio carries?

- Correlation Table
- Diversification Effect Chart
- Concentration Limit Test
- Allocation Mix Outline
- Rebalancing Rule Sheet



Day 4: Costs, Managers and Oversight

What do investments cost, and how are managers and advisers judged?

- Fee Drag Model
- Manager Selection Question List
- Performance Against Benchmark Review
- Conflict of Interest Check
- Investment Policy Statement Outline

Day 5: Investment Policy Brief for One Pool of Funds

Do the purpose, limits, costs and review rules support one workable policy?

- Applying the Session 2 Risk Tolerance Statement
- Testing the Session 3 Allocation Mix Outline
- Reviewing the Session 4 Fee Drag Model
- Checking the Session 4 Manager Selection Question List
- Completing the Investment Policy Brief

Methodology

The programme uses a case analysis method built on a shared case of an organisation holding reserves and a pension pool, with two competing proposals from managers. Participants test each proposal with simple worksheets, then adapt the same tools to a pool of funds from their own organisation, so that the final brief reflects real decisions.

- Suggested activity: Comparing two proposals by risk, return and fee drag.
- Suggested activity: Building an allocation outline to meet a stated purpose and loss limit.
- Suggested activity: Questioning a mock adviser using a structured list.

Capstone Output

Each participant completes an investment policy brief for one pool of funds. It holds a purpose statement, a risk tolerance statement, an allocation outline, a fee drag test and a manager review routine. The brief is used at work to guide an investment committee, brief a board and set the questions asked of managers and advisers.



Frequently Asked Questions

Is investment fundamentals training suitable for executives without a finance background?

Yes. Investment fundamentals is taught through cases and worksheets, assuming senior responsibility for funds or oversight but no investment qualification and no advanced mathematics.

Which principles does investment fundamentals training rest on?

Investment fundamentals training rests on risk and return, diversification, the time value of money and the investment policy statement concept, with no single standard governing the subject.

How is the brief from investment fundamentals training used at work?

You use the investment policy brief to guide an investment committee, brief a board and set the questions asked of managers and advisers when reviewing results.

How does investment fundamentals differ from portfolio management training?

Investment fundamentals centres on how investments work and how approvers oversee them, while portfolio management training covers asset allocation methods, risk budgeting and manager governance in depth.