Investments MASTERCLASS

25 JULY 2020

VENUE:
Blue Tree (Gaborone)

TIME:
0800Hrs to Lunch (Tea & Lunch Provided)

TICKET
P1,000.00

"This Masterclass is aimed at preparing the average Motswana adult in making informed decisions on investment opportunities and products available in Botswana."

WHO SHOULD ATTEND

Young Professionals Starting Out in Employment | Self Employed People & Entrepreneurs
Mid-Career Professionals | Late Career Professionals
Retirees & Near Retirees

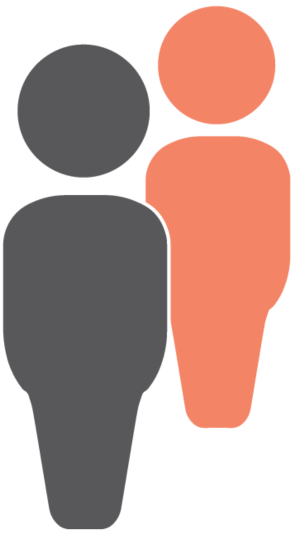
Info & Tickets: (+267) 72 232 365 / mphoengm@gmail.com

BACKGROUND

It is extremely apparent that the average adult in Botswana without a specific background in Finance or Investments, is generally not aware of most investment opportunities in Botswana; or when aware, doesn't know where to start and how to think about evaluating and choosing possible investments. This masterclass aims to bridge this gap as widely as possible. This would therefore be considered a beginners masterclass which is still relevant to individuals with some experience in personal investments but without a proper theoretical foundation.

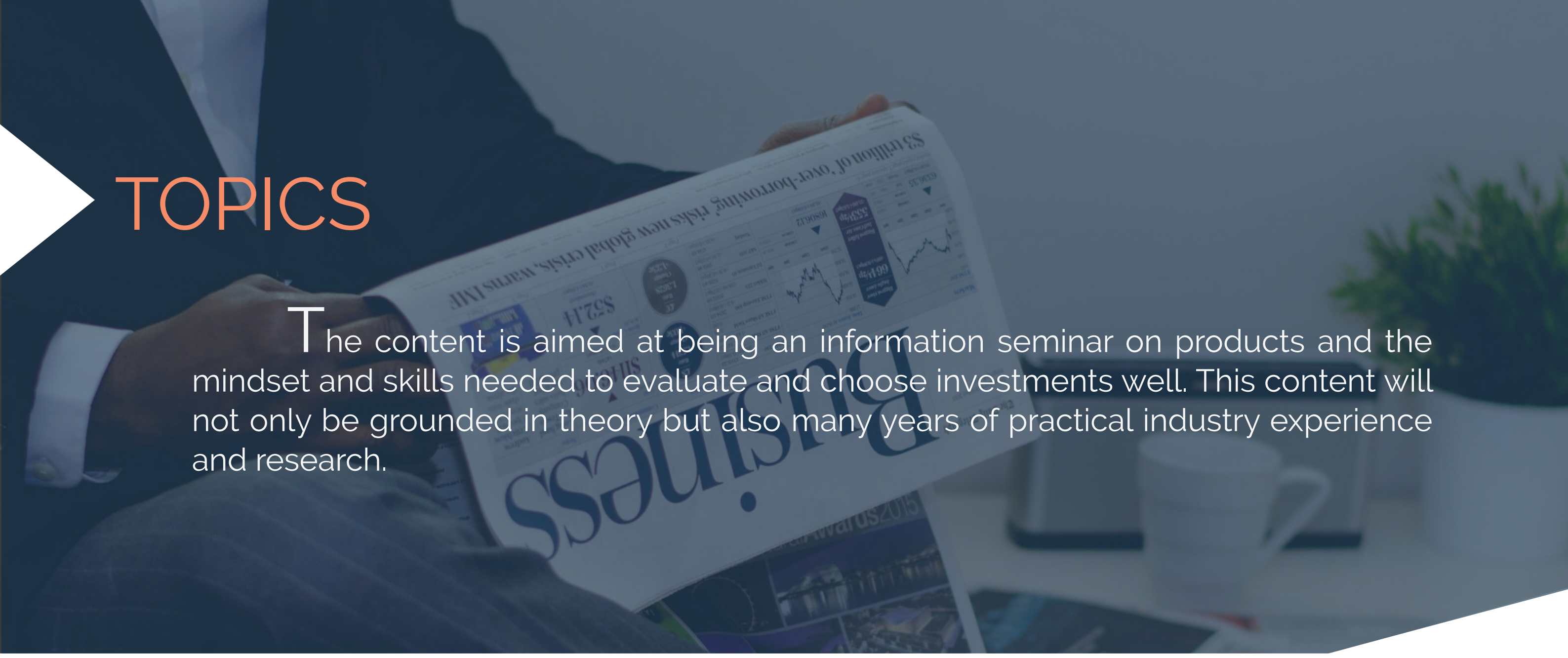
The Masterclass is delivered by experienced industry professionals who will share their knowledge to empower Batswana in the art of investment. The Masterclass will not be an advisory forum i.e. attendees would not be getting advice on what specific investments or products to choose. The attendees would rather be informed on the universe of products available to them and how they should think about them when considering what to invest in. This is the first critical step towards making life decisions regarding personal wealth management.

TARGET MARKET



- Young professionals starting out in employment
- Self employed people & entrepreneurs
- Mid-career professionals
- Late career professionals
- Retirees and near retirees

These groupings content would differ slightly in recognition of the different needs, challenges and lifestyles. Ideally specific classes will not mix individuals from differing groups.



TOPICS

The content is aimed at being an information seminar on products and the mindset and skills needed to evaluate and choose investments well. This content will not only be grounded in theory but also many years of practical industry experience and research.

1 *Dealing With Financial Services Companies*

The executive summary of this concept note introduces the broad observation that the financial services industry is arguably one of the least understood industries. It is therefore instructive that interactions between financial services professionals and consumers be as fair and transparent as possible. It is also critically important that the interactions take place within the realms and provisions of the industries' regulation. This critical piece focuses on the importance of upholding TCF when dealing with consumers.

2 *Considerations when investing*

We will explore considerations for individual investors when they consider how and which investments to choose. These would include things like age, career stage, income, lifestyle, needs etc

3 *Fundamentals of investing*

This topic will look into basic fundamentals such as cash-flow analysis and discounting, risk and return concepts etc.

4 *Basic investment products in Botswana*

Attendees will be given a crash course in money markets, bonds, shares (listed and unlisted), unit trusts, foreign currency, exchange traded funds, property, insurance products etc. This section would give basic explainers on the properties, risks and cash-flows of the different products. We would also provide attendees with practical information on how these can be found and explored which is specific to Botswana.

5 *Thinking about retirement*

This is a high level introduction to the concept of retirement covering the journey towards retirement right from the formative working years until the moment retirement. Emphasis will be on how to prepare and what financial products and services to consider

6 *Pension products & solutions in Botswana*

- Institutional Pension Funds – a discussion on the theoretical concept of pension funds in the context of employee benefits
- Individual Pension Plans – this would be similar to the institutional pension funds discussion with an emphasis on the retail nuance and what factors individuals need to consider regarding available offerings locally
- Retirement Annuities – a discussion around individual retirement annuity products as well as how they augment pension plans
- Provident Funds – over and above an introductory discussion of provident funds, the topic focuses on the specific differences between provident funds and other pension plans
- Life Annuities – This covers the traditional life annuities offered locally and the various providers of the product
- Living Annuities – This topic entails living annuities specifically and a distinction between them and life annuities

7 *Final Thoughts*

This contains some final points to think about going forward. It will involve a practical life decision and how that can affect your future and that of your kids.

EXECUTION MODEL

CLASS SIZE

Classes should allow for reasonable interaction. Class sizes will range between 20 and 30 attendees at a time to ensure optimum level of interaction.

LENGTH

The Masterclass would be delivered to last half a day on a chosen Saturday.

RESOURCES

The Masterclass will come with an information booklet (hard copy) that attendees would get and make notes in.

PRICING

In order to make the classes as inclusive as possible the pricing will be initially pegged at P1,000.

PROGRAM OUTLINE

TITLE	TIME	MODERATOR
Introduction to Dealing with Financial Services	0800Hrs (30 Minutes)	Kabo Motsumi
Considerations When Investing	0830Hrs (15 Minutes)	Kabo Motsumi
Fundamentals of Investing	0845Hrs (45 Minutes)	Mphoeng Mphoeng
Basic Investments Products In Botswana	0930Hrs (135 Minutes)	Mphoeng Mphoeng
Thinking About Retirement	1145Hrs (30 Minutes)	Kabo Motsumi
Pension Products & Solutions In Botswana	1215Hrs (45 Minutes)	Kabo Motsumi
Final Thoughts	1300Hrs (30 Minutes)	Mphoeng Mphoeng

MODERATOR PROFILES

Mphoeng Mphoeng

Mphoeng is currently employed at University of Botswana as a Lecturer in the Department of Accounting and Finance at the Business Faculty. He holds an MSc in Finance from Manchester Business.

Before joining the University in 2016, Mphoeng worked at Botswana Insurance Fund Management as Portfolio Manager for Unlisted Credit. This role involved managing a credit portfolio, assessing potential projects in property, lending and private equity. Prior to BIFM (who he joined in 2012), he was employed as the Head of Fixed Income Trading for Botswana and Zambia at Standard Chartered Bank mainly trading in Botswana Government bonds.

His career started in 2006 at the Bank of Botswana where he was a Trainee Supervisor managing the Botswana Foreign Reserves for the International Dealing and Strategy Unit in the Financial Markets Department between 2006 and 2009.

Kabo Motsumi

Kabo is currently employed in a financial services multinational company with more than 15 years working in the financial services industry, both locally and abroad. He holds a Degree in Business Administration from Palumbo Donahue School of Business in the US.

Kabo worked in banking in the US before returning to Botswana to Botswana where he has extensive experience in asset management and banking. He has worked in differing roles and capacities at renowned institutions like Bank of New York Mellon, Fleming Asset Management, Standard Chartered Bank, BIFM and Liberty Life Botswana.

Kabo has more than 10 years of senior management experience in client-facing roles. His roles have been focused on relationship management, sales and client service initiatives covering clients across various sectors such as mining, diamond, financial services, retail, automobile and consulting services. In these roles he has mainly managed relationships in the pension fund space and has also overseen the running of retail investment units.

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CONTACTS

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