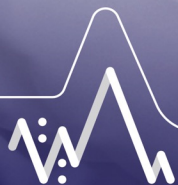


Excellence in Investment Committees

برنامج التميز في لجان الإستثمار

#معاً نصنع الأثر
Together we make impact




 Training Partner

 مركز الحكومة
 CENTER FOR GOVERNANCE
 Powered By Public Investment Fund


Riyadh



17,250


 • 28 - 29 June 2026
 • 06 - 07 Oct 2026

This 2-day program is designed for board members, trustees, and institutional investors responsible for governing investment programs and ensuring alignment between mission, strategy and policy.

It focuses on investment governance, fiduciary accountability and decision-making discipline. Equipping participants to lead with clarity and confidence in their oversight role.

Participants will explore the structure and authority of investment committees, the formulation of policy and asset mix, the evaluation and selection of managers, and the use of performance benchmarks within a robust governance framework.

Target Audience

- Board Members Serving on Investment Committees
- Board Directors and Trustees Preparing to Join Investment Committees
- Chairs and Members of Oversight Committees
- Institutional Investors

Content

- Understand the fiduciary and governance responsibilities of investment committees.
- Learn to design and evaluate investment policy, asset mix and oversight structures.
- Identify behavioral and organizational barriers to committee performance.
- Apply due diligence and selection frameworks for manager oversight.
- Evaluate portfolio outcomes using benchmarking and attribution principles.

PROGRAM MODULES

This 2 days immersive learning experience combines a comprehensive blend of highly integrated modules built on the global and regional perspectives, it draws on the regional context and experience with local case studies.

ROLES & RESPONSIBILITIES OF THE INVESTMENT COMMITTEE

This module covers:

- Fiduciary and governance roles of the investment committee.
- Developing and maintaining an Investment Policy Statement (IPS).
- Setting an asset mix policy, selection, weighting and rebalancing.
- Designing the investment management structure (active vs passive, mandate design and vehicles).
- Reviewing and approving Investment Management Agreements (IMAs).
- Establishing policies, oversight frameworks and meeting protocols.

PERFORMANCE BARRIERS AND STAKEHOLDER MANAGEMENT

This module covers:

- Unclear investment guidelines and inconsistent standards.
- Ineffective diversification across asset classes, geographies, managers and time.
- Misaligned time horizons between committee, program and management.
- Defective communication, emotional biases and analysis paralysis.
- Managing consultants, brokers, custodians and external managers.
- Addressing governance implications of fees, transparency and accountability.

INVESTMENT SELECTION AND DUE DILIGENCE

This module covers:

- Prerequisites for sound manager and product selection.
- Step-by-step selection process:
 - Defining investment objectives and governance alignment.
 - Building candidate universes and shortlisting proposals.
 - Conducting due diligence and final evaluations.
 - Negotiating terms and aligning interests.
 - Formalizing appointments and establishing oversight mechanisms.
- Terminating Managers

MEASURING SUCCESS — HOW COMMITTEES EVALUATE INVESTMENT PERFORMANCE

This module covers:

- Defining benchmarks that reflect investment policy intent.
- Understanding the three benchmark types.
- Applying benchmarks for:
 - Total-fund performance evaluation.
 - Manager performance assessment
 - Manager compensation and incentive alignment.
 - Attribution analysis and interpretation
- Recognizing the limitations of performance measurement (inflation, peer-group bias and index comparability).

About the Financial Academy

Excellent Work Groups

Training at the Financial Academy gives you the opportunity to join and interact with carefully-selected groups of peers, who work at different organizations and job levels. This pool of diverse perspectives will enrich your learning experience and expand your professional network within the financial sector.



An Optimal, Have-It-All Learning Environment

The Academy's facilities offer a unique learning environment, featuring high-quality training rooms equipped with cutting-edge technologies, spacious shared lounge areas, latest technology, dining facilities and a variety of other amenities. Prayer rooms for men and women are available as well.



Easy-to-Reach Offices

The Financial Academy is easily accessible, being directly connected to King Abdullah Financial District (KAFD) Metro Station via a pedestrian bridge. It is alternatively easy to reach using ride-hailing apps or private cars: Once you get to KAFD, head to Building No. 2.07 through Area 2.



At the Heart of KAFD

Being situated at KAFD where most of the financial sector organizations are near, the Financial Academy's location is unique and strategic. Plus, the place is known for being a business and entertainment hub where many cafes and restaurants are located, making the learning experience more thrilling and enjoyable thanks to the exciting surroundings.



Connecting and Learning.

Though it comes from within, transformation often requires a catalyst. And for many business leaders, the Financial Academy (FA) professional training programs and development activities have been that catalyst. Here, you're fully immersed in a transformational living-learning experience, networking with gurus from around the world, and engaging in programs led by prominent local and international financial industry experts . It's a holistic experience that will enrich and develop your career - and your life.

ADMISSIONS

We admit candidates to specific sessions on a rolling space available basis, and encourage you to apply as early as possible. Although most programs have no formal educational requirements, admission is a selective process based on your professional achievement and organizational responsibilities.

FOR MORE INFORMATION

<https://fa.gov.sa/en?language=en>

FOR A PERSONALIZED CONSULTATION

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