COURSE AGENDA

The Smart Investor Masterclass 2027

Shares, Unit Trusts & Government Bonds: Learn How to Invest in Zambia

COURSE INFORMATION

DATES
Thursday 28 – Friday 29 January 2027

TIME
08:00 – 16:00 CAT daily (registration from 07:30)

FEE
US$250 per participant – covers both days

ORGANISER
Insight Partners Africa

DURATION
2 full days

VENUE
Radisson Blu Hotel, 19029 Great East Road, Lusaka

REGISTRATION DEADLINE
Wednesday 20 January 2027

FORMAT
In-person, instructor-led workshop

COURSE OVERVIEW

Learn how Zambian investors can access, assess and compare listed shares, regulated unit trusts and Government of the Republic of Zambia (GRZ) bonds. Practical exercises demonstrate the steps, costs, return drivers and risks of each investment type.

This programme is financial education, not personal investment advice.

LEARNING OUTCOMES

- Explain how shares, unit trusts and GRZ bonds work and where their risks differ
- Identify the institutions, documents and accounts involved in accessing each investment
- Interpret illustrative dividend, unit trust and bond cash-flow calculations
- Compare liquidity, fees, time horizons, diversification and potential returns
- Draft a personal investment action checklist and questions to ask licensed providers

WHO SHOULD ATTEND

Individual investors, professionals, business owners, first-time investors and anyone who wants to understand Zambia's investment market.

DAY ONE

Thursday 28 January 2027 · Investing in Shares and Unit Trusts

07:30 – 08:00	**Arrival, registration and networking**
08:00 – 08:30	**Investment landscape and investor goals** Opening: investment goals, risk, inflation and the Zambian investment landscape
08:30 – 09:45	**Understanding shares and the Lusaka Securities Exchange** Ownership, dividends, capital gains, the Lusaka Securities Exchange and listed-company information
09:45 – 10:00	**Tea break**
10:00 – 11:30	**Practical steps to buying shares** Selecting and assessing a licensed stockbroker, account opening, placing an order, fees and custody
11:30 – 12:30	**Lunch break**
12:30 – 13:45	**Understanding unit trusts and fund performance** Fund types, diversification, unit pricing, charges, redemption and fund documentation

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DAY ONE

continued · Thursday 28 January 2027

13:45 – 14:00	**Tea break**
14:00 – 15:10	**Practical comparison exercises** Compare a share and a unit trust using illustrative disclosures, fees and scenarios
15:10 – 16:00	**Questions and recap** Review, questions and day-one learning check

DAY TWO

Friday 29 January 2027 · Government Bonds and Informed Investment Decisions

07:30 – 08:00	**Arrival and recap**
08:00 – 09:30	**Understanding Government bonds** GRZ bonds: face value, coupon, yield, maturity, price, inflation and interest-rate risk
09:30 – 09:45	**Tea break**
09:45 – 11:15	**Bond auctions and how investors participate** Bank of Zambia investor requirements, auction calendar, competitive and non-competitive applications, settlement and secondary-market considerations
11:15 – 12:15	**Lunch break**
12:15 – 13:30	**Practical Government bond calculations** Coupon cash flows, clean versus dirty price, accrued interest and illustrative yields
13:30 – 13:45	**Tea break**
13:45 – 14:45	**Comparing the three investment options** Building a balanced approach: compare shares, unit trusts and bonds across risk, time horizon, liquidity and total costs
14:45 – 15:15	**Preparing an investment action plan** Create an investor checklist and questions for a stockbroker, fund manager or bank
15:15 – 16:00	**Questions, evaluation and closing** Knowledge check, feedback and close

Workshop Conclusion

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TRAINING APPROACH

Practical and interactive, with real-world illustrations and hands-on calculation exercises across both days. Worked examples are illustrative only: they use stated assumptions or clearly labelled historical data, and are not current investment offers or forecasts.

WHAT TO BRING

A laptop or calculator is recommended for the exercises. Bring questions about your investment goals. No account opening, trade execution or product purchase is required during the training.

IMPORTANT NOTES

This is a proposed programme; session times and training arrangements may be refined by the organiser. Course content will be updated against prevailing 2027 rules, providers, fees and Bank of Zambia auction documents before delivery. The registration fee is not an investment contribution, and no returns are guaranteed. The workshop provides financial education, not personal investment recommendations.

REGISTRATION & ENQUIRIES

Book online at www.insightpartnersafrica.com/events/smart-investor-masterclass-2027/ or contact Insight Partners Africa on +260 211 297 050 or info@insightpartnersafrica.com. Registration closes on Wednesday 20 January 2027.