

**Unit: IA6 Measure the performance of investments**

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**Overview**

This unit relates to the measurement of investment performance and covers the role of gathering information about performance, together with analysing and presenting that information. Information about investment performance is obtained, for example, from price movements and market trends, which can then be analysed against the objectives of the fund/account. Results of this analysis need to be communicated, in an accepted presentation format, to fund managers, investment managers etc.

***Outcomes of effective performance***

- IA6/O1 You obtain and analyse information relating to fund or account performance
- IA6/O2 You measure performance against objectives and other valid criteria using accepted tests
- IA6/O3 You compare and contrast the actual and potential performances of the fund or account
- IA6/O4 You ensure information on fund or account performance is complete, accurate and presented within agreed timescales
- IA6/O5 You report results in the required format to the appropriate people
- IA6/O6 You present an analysis of performance accurately and clearly
- IA6/O7 You ensure results of performance measurement provide indications of future performance and recommendations for future action

***Behaviours which underpin effective performance***

- IA6/B1 You recognise changes in circumstances promptly and take these into account in your work
- IA6/B2 You use information and knowledge effectively, efficiently and ethically
- IA6/B3 You present information clearly and concisely
- IA6/B4 You pay attention to details that are critical to your work
- IA6/B5 You carry out tasks with due regard to your organisation's policies and procedures, including those covering health and safety at work

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***Knowledge and understanding***

1. What the broad structure of investment markets is and the effect of market trends on fund/account performance
2. What the key sources of reliable and relevant information are in relation to fund/account performance
3. The use of statistical models for analysing information about fund/account performance
4. What the regulatory issues are associated with reporting fund performance and predicting fund performance
5. What the application of appropriate systems is for measuring fund/account performance within the administrator's own organisation
6. What the broad objectives are of funds/accounts with which the administrator is involved
7. What the roles and responsibilities of other departments and individuals are within the organisation and how to establish and maintain effective relationships with colleagues, including the use of interpersonal and communication skills and the concepts of quality service delivery
8. What the appropriate sources of data for fund/account performance are, including competitors' performance
9. How your organisation's requirements relating to the application of codes, laws and regulatory requirements, including health and safety, impact on your activities