

CFA SOCIETY GERMANY

Overview

August 2021



**CFA Society
Germany**

AGENDA



CFA Institute und CFA Society Germany

The CFA Qualification

CFA Institute Research Challenge



CFA INSTITUTE AND CFA SOCIETY GERMANY

THE CFA INSTITUTE KEY FIGURES

- CFA Institute is the global, not-for-profit member association of investments professionals that awards the prestigious CFA designation
- More than **170,000 members** globally
- More than **150 member societies** worldwide
- CFA Institute works with **educational establishments within the University Affiliation Program** in the EMEA region e.g. European Business School, Frankfurt School of Finance and Management, Goethe University, Mannheim University, International School of Management, Oxford University (business school), INSEAD (France) and London Business School
- CFA Institute was founded in 1947 in Charlottesville, USA



WHO WE ARE – ORGANISATION

- Largest association for investment professionals in Germany
- Non-profit association, founded in 2000
- Based in Frankfurt, members all over Germany
- www.cfa-germany.de

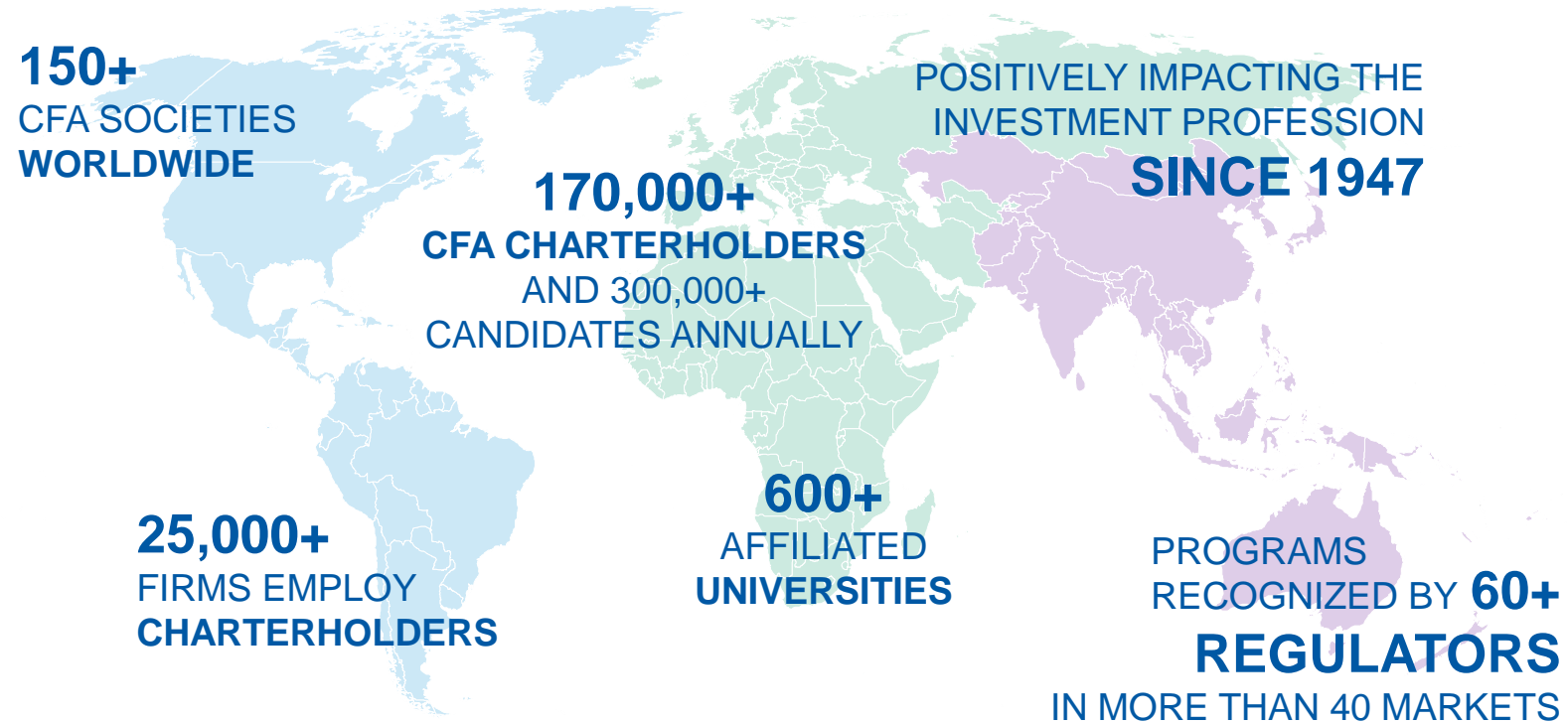


MISSION



Be the leading national authority for investment professionals in Germany, promote the highest ethical standards and professional excellence in the German investment community and actively represent German investment professionals within the global CFA institute network

LARGE GLOBAL NETWORK AND CONNECTIVITY

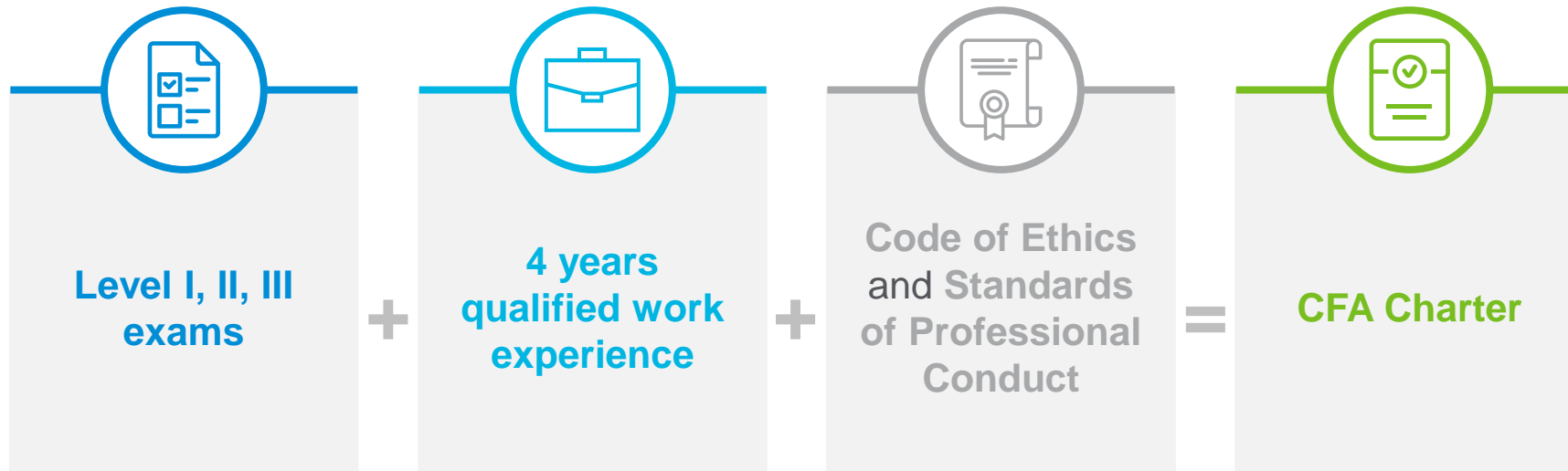


Data as of 9/30/18



THE CFA QUALIFICATION

THE CFA QUALIFICATION



The CFA Charter is held by more than **160,000 investment professionals** working in more than **150 countries**



More than **500 universities** around the world incorporate the CFA curriculum into their degree programs, including **5 universities in Germany**

THE VALUE OF THE CHARTER

CFA Program Benefits



GOLD STANDARD

CFA equips you not only to enter the profession but also to excel



UNMATCHED EXPERTISE

Our rigorous curriculum will equip you for complex investment decisions



STRONG ETHICAL FOUNDATION

Gain confidence and clarity in navigating ethical issues



PRESTIGIOUS NETWORK

Connect with an exclusive group of outstanding investment professionals



GLOBAL PASSPORT

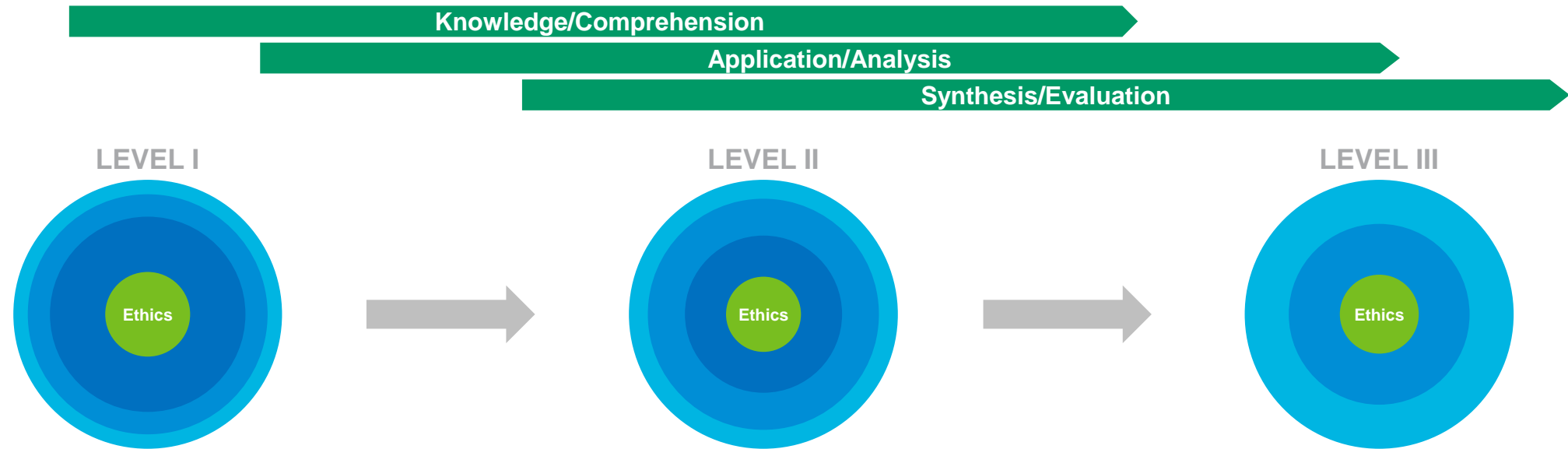
Earn waivers from regulatory agencies, graduate programs, and more



CAREER RESOURCES

Gain access to career guides, thought leadership, and continuing education

THE THREE LEVELS OF THE CFA EXAM



Ethics & Professional Standards

Investment Tools

- Quantitative Methods
- Economics
- Financial Reporting & Analysis
- Corporate Finance

Asset Classes

- Equity Investments
- Fixed Income
- Derivatives
- Alternative Investments

Portfolio Management & Wealth Planning

- Institutional
- Private Wealth
- Portfolio Evaluation
- Risk Management

CFA PROGRAM IN A DIGITAL AGE

- CFA Institute continues to respond to the ever-changing global situation and impacts of COVID19. With continued uncertainty, CFA Institute has been working diligently to modernize the exam and turn challenges into positive opportunities.
- As a result and with respect for the candidate experience, **all levels of the CFA exam shifted from paper-based (PBT) to computer-based testing (CBT) in 2021.**
- The acceleration of moving Levels II and III to CBT will provide operational flexibility to quickly and reliably adjust to the changing landscape in response to either global or local situations.
- This change provides smaller group sizes, better social distancing, easier scheduling with more locations, and less uncertainty about planning.



CFA INSTITUTE RESEARCH CHALLENGE – LOCAL COMPETITION GERMANY

PROCESS

The Challenge starts in October and ends with a presentation early in the following year. It consists of the following components:

- ***Analysis of a Public Company:*** Teams research the same public company, selected by the CFA Society Germany, including a question and answer session with the company management.
- ***Mentoring by a Financial Professional and a Faculty Advisor:*** Each team is mentored by a professional research analyst, who reviews and critiques the team's report.
- ***Research Report:*** Each team writes a research report on the subject company which is then critiqued and evaluated by experienced financial experts.
- ***Presentation of Research:*** the 3 best teams (selected by their reports) present to a high-profile panel of CFA Charterholders and executives from the financial industry. The winning team will be selected based on the combined scores for the written report and the presentation.
- ***The winner will take part in the CFA Institute Subregional Challenge*** and in case of success in the EMEA Final and potentially qualify for the Global Final.

2020 RESEARCH CHALLENGE RECAP

6,400+

Students

4,000+

Volunteers

150+

CFA Societies

1,100+

Universities

121

Local Challenges

98

Countries

PARTICIPATING UNIVERSITIES IN 2020/2021 IN GERMANY

Team

EBS European Business School

Frankfurt School of Finance & Management

GISMA Business School

Goethe University Frankfurt

Heilbronn University

Ludwig-Maximilians-Universität München

RWTH Aachen

TH Nürnberg

Tuebingen University

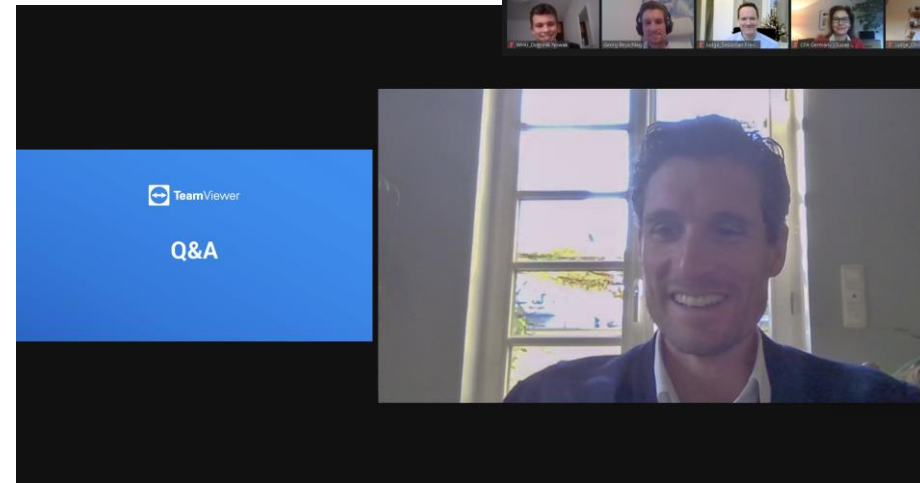
TU München

WHU – Otto Beisheim School of Management

Kick-Off Meeting October 2020

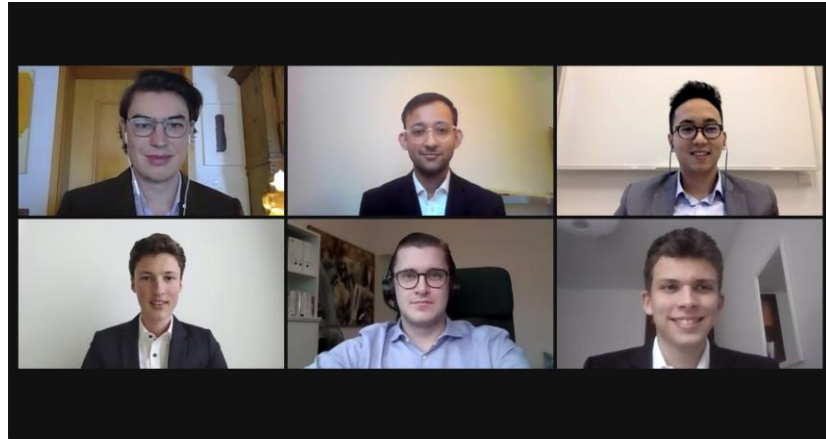


Company presentation November 2020

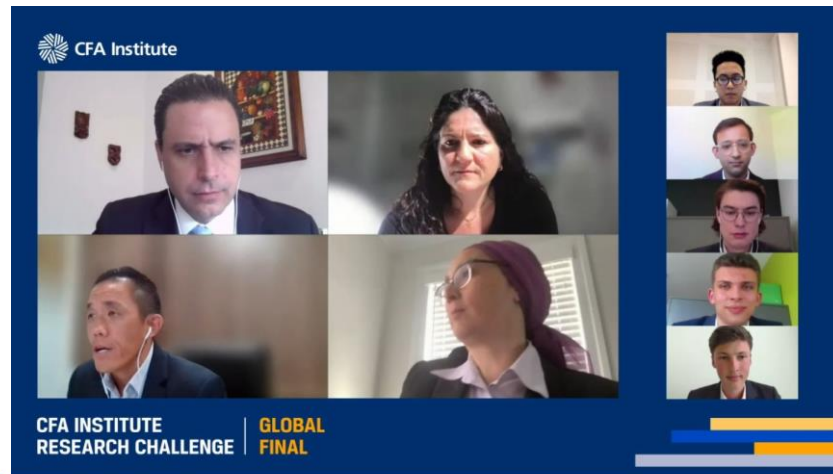


2020/2021 GERMAN CHAMPIONS: WHU - OTTO BEISHEIM SCHOOL OF MANAGEMENT

Local Final Germany January 2021



EMEA Semifinals April 2021



Research Challenge Global Finals 2021
Global Final April 2021



SUBJECT COMPANY

The same company will be analyzed by all German teams

- In 2011 the subject company was Pfeiffer Vacuum
- In 2012 the subject company was adidas Group
- In 2013 the subject company was HUGO BOSS
- In 2014 the subject company was Kabel Deutschland
- In 2015 the subject company was Wacker Chemie
- In 2016 the subject company was Carl Zeiss Meditec AG
- In 2017 the subject company was ProSiebenSat. 1 Media SE
- In 2017/2018 the subject company was BRAIN AG
- In 2018/2019 the subject company was Fresenius Medical Care
- In 2019/2020 the subject company was Beiersdorf
- In 2020/2021 the subject company was TeamViewer



HUGO BOSS



Kabel Deutschland



B•R•A•I•N

Beiersdorf

