

CFA SOCIETY GERMANY

OVERVIEW

July 2019



**CFA Society
Germany**

AGENDA



The CFA Qualification

CFA Institute und CFA Society Germany

CFA Institute Research Challenge



THE CFA QUALIFICATION

“Among the countless finance degrees around the world, the Chartered Financial Analyst qualification has become the gold standard”

Financial Times

WHAT IS THE CFA CHARTER?

- The leading global investment credential
- A standard of professional excellence
- A commitment to ethics



“The CFA qualification has become the gold standard.” *Financial Times*



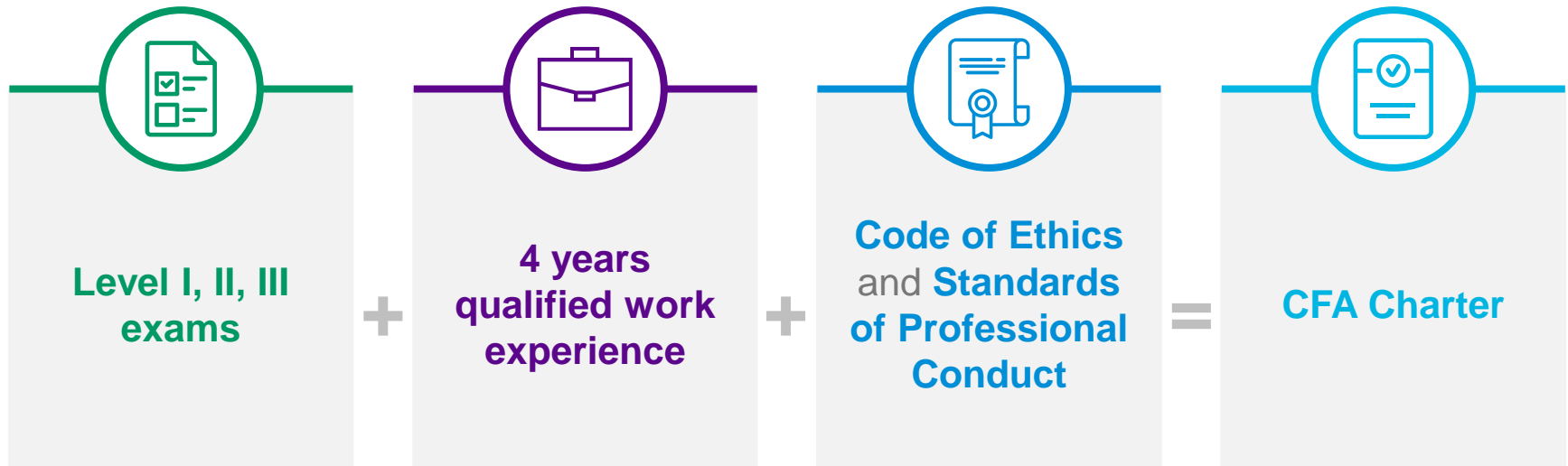
“Explosive growth has made the CFA global currency.” *The Economist*



“CFA designation, or working towards it, is an asset.” *eFinancialCareers*



THE CFA QUALIFICATION



The CFA Charter is held by more than **139,000 investment professionals** working in more than **150 countries**



More than **425 universities** around the world incorporate the CFA curriculum into their degree programs, including **5 universities in Germany**

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 **145,000 members** globally
- **144 member societies** worldwide
- CFA Institute works with over **30 educational establishments as CFA Program Partners** in the EMEA region e.g. EBS, Mannheim University, Goethe University, 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

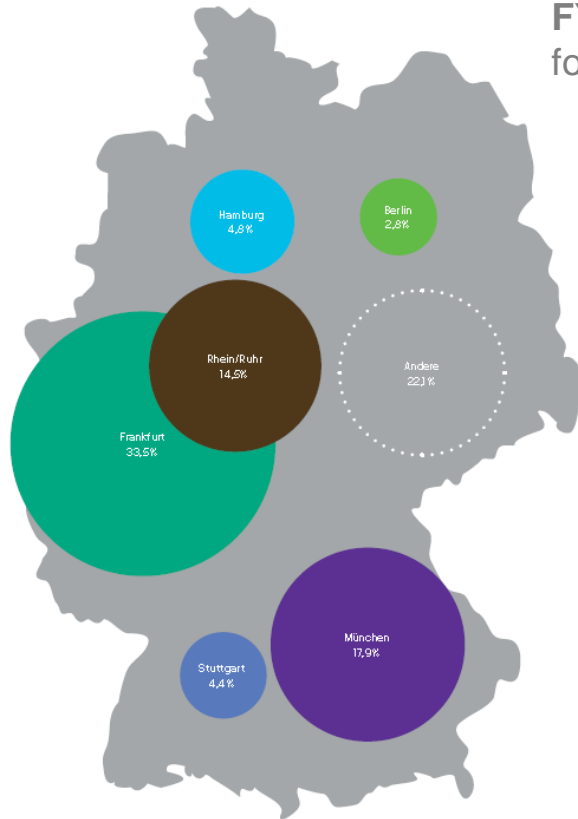


Be the leading national authority for investment professionals in Germany, promote the highest ethical standards and professional excellence in the German investment community and actively represent German investment professionals within the global CFA institute network



CONTINUING EDUCATION

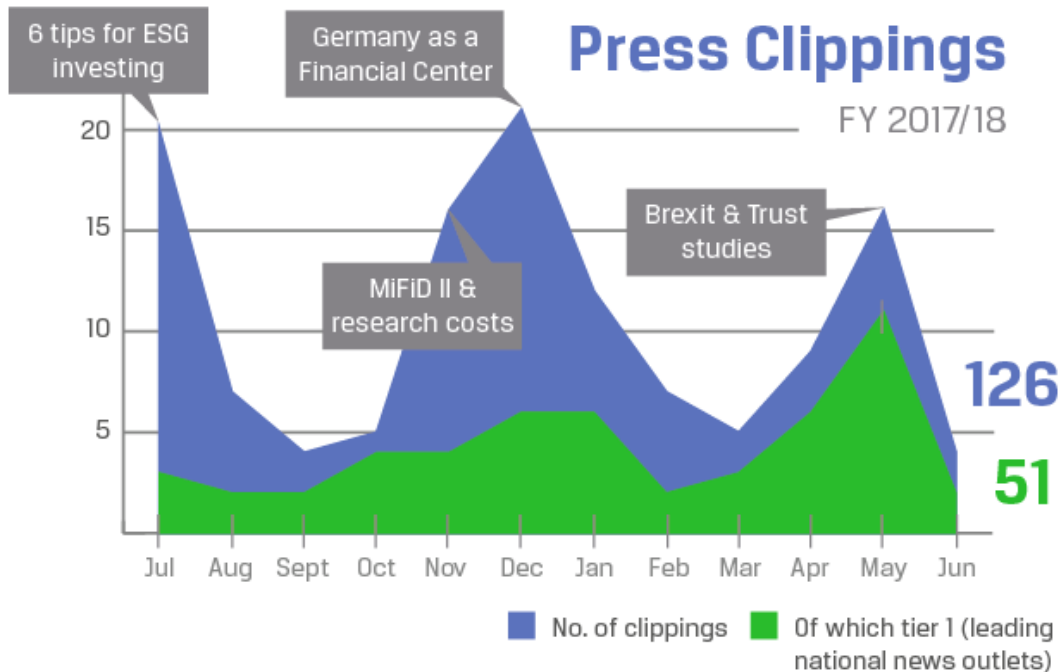
76 Events in 7 German Cities in
FY 2017/18 – mostly free of charge
for society members



- CFA Lectures
- Workshops
- Roundtables
- Society Events
- Expert Networks
- Casual Events



PUBLIC RELATIONS & SOCIAL MEDIA



Most mentions by media outlet

TOP 5

1. WirtschaftsWoche	26
2. Handelsblatt	9
3. Börsen-Zeitung	8
4. institutional money	5
5. finanzen.net	5

Social Media Channels

Did you know?

You can connect with us on:

[Twitter \(@CFAGermany\)](#)

[LinkedIn \(@CFA Society Germany\)](#)

[Xing \(CFA Society Germany\)](#)



2 Years WiWo series

WirtschaftsWoche



EXPERTEN DER CFA SOCIETY GERMANY

Verkehrte (Finanz)welt

Jahrhundertlang haben sich Finanzgeschäfte kaum verändert. Heute scheinen fast täglich neue Innovationen und Trends die Märkte umzuwälzen. Experten der CFA Society Germany geben Einblick in den Wandel der Finanzwelt.

Verkehrte (Finanz)welt
(every 2 weeks)

CFA INSTITUTE RESEARCH CHALLENGE

RULES AND TIMELINE

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:*** 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 Regional Challenge*** for the EMEA-region and in case of success in the **Global Final**.



CFA INSTITUTE RESEARCH CHALLENGE GLOBAL NETWORK

2018 Season Statistics

5,700+ Students

4,000+ Volunteers

1,100+ Universities

150 Local Societies

112 Local Challenges

85 Countries



Ateneo de Manila University - The global winner team of the 2018/2019 season



The EMEA Regional Final in Zurich in April 2019



PARTICIPANTS

In 2018-2019 these universities took part in Germany:

- European Business School
- Frankfurt School of Finance and Management
- HDBW – Hochschule der Bayrischen Wirtschaft
- Heilbronn University
- LMU München
- RWTH Aachen
- TH Nürnberg
- TU Dresden
- TU München
- Uni Hohenheim
- Uni Augsburg
- WHU – Otto Beisheim School of Management



The Company Presentation in November 2018 in Frankfurt with all the student teams

Only one team of 3-5 students per university is admitted to take part.



2018-2019 GERMAN CHAMPIONS: RWTH AACHEN



The winning team from Frankfurt
RWTH Aachen

Their valuation report was about
the subject company Fresenius
Medical Care

The team was coordinated by Prof.
Dr. Astrid Salzmann

Their Industry Mentor was Patrick
Nass, CFA

Impressions of the local final on February 5th 2019 in Frankfurt:



SUBJECT COMPANY

The same company will be analyzed by all 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
- The subject company for 2019/2020 will be announced in October 2019



HUGO BOSS



Kabel Deutschland



CARL ZEISS MEDITEC



ProSiebenSat.1
Media SE



FRESENIUS
MEDICAL CARE

B·R·A·I·N