



Finance @ The University of Melbourne and the CFA Institute

The CFA Institute is a global association of investment professionals that offer a range of educational services, including the CFA (Chartered Financial Analyst) Program which specializes in portfolio management and investment analysis.

The CFA Institute has partnerships with select universities around the world that have embedded a significant percentage (70%) of the CFA® Program Candidate Body of Knowledge into their degree programs. As of April 2009, The University of Melbourne became a CFA Program Partner in Australia based on the Bachelor of Commerce with a major in Finance, and based on the Master of Finance. Recognition signals that the degrees' curricula are closely tied to professional practice and are well suited to students preparing to sit for the CFA® examinations.

The Department of Finance would like to invite BCom (Finance major) and Master of Finance students to attend the following information session on the CFA Program, the CFA Partnership (and its benefits to finance students at The University of Melbourne), and the upcoming CFA Investment Challenge:

Date:	Tuesday, 26 May, 5.15pm
Venue:	Basement Theatre, The Spot, 198 Berkeley Street (the new Faculty of Economics and Commerce).

For more details on the information session, please contact the Partnership Director, Paul Kofman at fin-hod@unimelb.edu.au .

Program on Tuesday 26 May

- 5.15pm** **Welcome by Professor Kofman, Head of Department,
The Department of Finance, The University of Melbourne**
- 5.20pm** **Peter Wilmshurst, President CFA Society of Melbourne**
- 5.50pm** **THE CFA GLOBAL INVESTMENT RESEARCH CHALLENGE**
- 6.10pm** **Q & A**
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CFA Global Investment Research Challenge

The University of Melbourne has been invited by the CFA Society of Melbourne (CFAM) to participate in this year's Investment Research Challenge. The Challenge is a competition in which student teams from the top area business schools write an equity research report on an assigned company and present their findings to a panel of investment industry experts. The winning team will advance to compete in regional, and ultimately, the final of the 4th Annual Global Investment Research Challenge hosted by the CFA Institute.

The Challenge consists of the following components:

- I. Analysis of a Public Company
- II. Mentoring by a Professional Research Analyst or Portfolio Manager
- III. Writing an Equity Research Report
- IV. Presentation of Research to a High-Profile Panel of Experts

The preliminary challenge to select The University of Melbourne team will be hosted by the FMAA and the Department of Finance at The University of Melbourne.

CFA Institute

The CFA Institute is a global association of investment professionals with more than 90,000 members and 135 societies worldwide. The CFA Institute publishes research, conducts professional development programs and sets ethics-based professional and performance reporting standards for the investment industry. They also offer a range of educational services across the world, including the CFA® (Chartered Financial Analyst®) Program which specializes in portfolio management and investment analysis. The CFA® Program is an educational program that entails a series of three exams, with each level offered every year. It is widely considered as the investment profession's most rigorous credentialing program with less than one in five candidates enrolling in the program ultimately successful in earning the CFA® Charter.