



2019 Global Champions
Ateneo de Manila University
Manila, Philippines

2019-2020

CFA INSTITUTE **RESEARCH CHALLENGE** **INDUSTRY OPPORTUNITIES**

Big Challenge. Bigger Opportunity.



CFA Institute
Research Challenge

CFA INSTITUTE RESEARCH CHALLENGE

THE CFA INSTITUTE RESEARCH CHALLENGE IS THE LARGEST EQUITY RESEARCH COMPETITION IN THE WORLD.

This annual program provides university students with hands-on mentoring and intensive training in financial analysis. Working in teams, students gain real-world experience as they assume the role of research analysts and are judged on their ability to value a stock, write a research report, and present their recommendations.

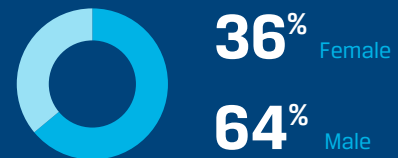
Teams compete with peers from other schools to see who will become the local, regional, and global champions.

Top Participating Universities:

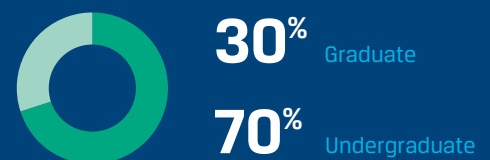
- Columbia University
- Cornell University
- Hong Kong University of Science and Technology
- National University of Singapore
- New York University
- Peking University
- Technical University of Munich
- Tsinghua University
- University of Amsterdam
- University of Copenhagen
- University of Oxford
- University of Toronto

Research Challenge Demographics

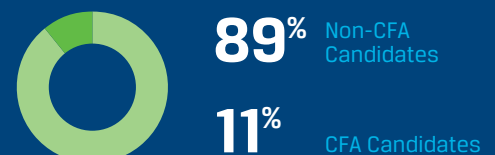
Gender Participation



Level of Education



CFA Program Candidates Rate



11% of students are CFA candidates at the time of competition kickoff

HOW DOES THE RESEARCH CHALLENGE WORK?



Regional Dates and Locations



Asia Pacific Regional
18–19 March 2020
Seoul, South Korea



EMEA Regional
1–2 April 2020
Dead Sea Area, Jordan



Americas Regional & Global Final
20–22 April 2020
New York, USA

PARTICIPANT PROFILE:

ALYSON SANDWICK, CFA

"I remember stepping out on the stage, the lights blaring. It was really a confidence building experience for me. It's something I'm still really proud of. At the end of the day it's about trying to tell a story because that's what's going to connect with people. You can do really sophisticated analyses, but if you can't communicate what that means and why people should care, it doesn't have the same impact."

Competitor Profile:

- Season: **2011**
- Local Competition: **Los Angeles**
- University: **University of Southern California**
- Subject Company: **Western Digital Corporation**
- Recommendation: **Buy**
- Advancement: **Americas Regional Champion**

Professional Profile:

- Employer: **The Blackstone Group**
- Job Title: **Director**
- Charter Award Date: **21 September 2015**
- Society Membership: **CFA Society New York**



OVERVIEW OF PREMIUM OPPORTUNITIES



Receive the highest recognition of support while partnering with CFA Institute to enhance the value of the Research Challenge and support the highest standards of ethics, education, and professional excellence for the ultimate benefit of society.

Premium supporters are part of the core investment management industry. These firms are primarily engaged in asset management, wealth management, fiduciary asset ownership, and their related regulators and standard setters.

Premium Partners are recognized as Platinum, Gold, or Silver dependent on the depth of engagement.

Platinum USD 50,000

Gold USD 35,000

Silver USD 20,000

Benefits of Participation

- Advance the industry and help prepare the next generation of investment professionals
- Get great brand exposure and promotion of your company on a global stage
- Promote education, excellence, and best practices
- Give back to the industry and the local community
- Network with peers, local universities, and other industry leaders in the community
- Make connections with young talent who will soon be joining the workforce

Examples of Engagement Opportunities

Student Career Opportunities

- Onsite interviews
- Job/internship prizes
- Career coaching

Learning Experiences

- "Day in the life"
- Firm visits
- Exchange tours

Volunteer Support

- Judges
- Mentors
- Speakers

Media and Promotion

- Social media
- Press releases
- Brand exposure

ABOUT CFA INSTITUTE

CFA Institute is a global community of investment professionals working to build an investment management industry where investors' interests come first, financial markets function at their best, and economies grow.

We are driven by the belief that lasting economic growth depends on trust, competence, and transparency in financial markets, and we know that it must be led by professionals who are ethically centered and professionally trained.

We are here to lead, support, and connect all who want to create a better investment industry.

BECOME A SUPPORTER

To secure any of these opportunities and gain access to university faculty and students participating in the CFA Institute Research Challenge, please contact:

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