2019 Global Champions
Ateneo de Manila University
Manila, Philippines

2019–2020
CFA INSTITUTE
RESEARCH CHALLENGE

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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
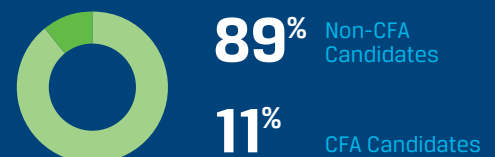
36% Female
64% Male

Level of Education

30% Graduate
70% Undergraduate
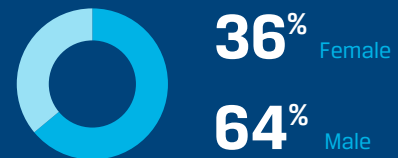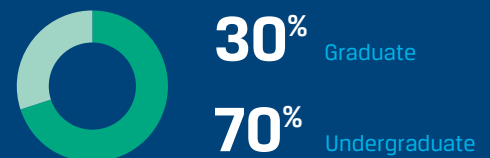
CFA Program Candidates Rate

89% Non-CFA Candidates
11% CFA Candidates

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

HOW DOES THE RESEARCH CHALLENGE WORK?

Step 1
Invitation
CFA member society invites university to participate

Step 2
Announcement
Society announces the subject company and teams begin their research

Step 3
Mentoring
Teams receive guidance from their industry mentor

Step 4
Evaluation
Industry professionals evaluate team's report and presentations to determine winners

Step 5
Regionals
Local competition champions compete at a Regional competition

Step 6
Global Final
Regional champions advance to the Global Final

Step 7
Winners
ONE TEAM WINS!

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**

Partner with CFA Institute to enhance the value of the Research Challenge and promote the highest standards of ethics, education, and professional excellence for the ultimate benefit of society.

Official Global Data Provider

With this exclusive sponsorship, your firm will have the opportunity to interact with students and university faculty throughout the season by providing access to your product for use during the competition. At regional events, encourage continued use of the product as a premium exhibitor.

Exhibitor

Exhibitors are prep providers, data services providers, and industry firms that want to display and market their products and services directly to this unique group of future investment management provessionals.

Corporate Supporter

Corporate supporters are industry firms that want to express their support of the Research Challenge and its participants.

Opportunities	Official Global Data Provider	Exhibitor	Corporate Supporter
Price	US $40,000	AMER: US $5,500 APAC: US $4,500 EMEA: US $5,000	US $1,000
Deliverables			
Pre-Event			
Promotion by CFA Institute directly to participating societies and universities regarding access to product.	•		
Logo recognition on the Research Challenge fact sheet	•		
One-time use of the global university student and university faculty contact list	•		
One-time use of university student and university faculty contact list for specific regional competitions	•	•	
Recognition on the Research Challenge website	•	•	•
Onsite			
Exhibit space	Premium	Table Top	
Recognition on signage	•	•	•
Recognition in the supporters section of the event app	•	•	•
Banner ad in the event app	•		
Branding recognition during the Research Challenge Livestream events	•		
Podium presence during the Global Final	3 minutes		
Brand recognition during all three regional opening receptions, all three regional lunches, and the Global Final Reception	•		
Event Passes	8	3	2
Post-Event			
One-time use of the global university student and university faculty contact list	•		
One-time use of university student and university faculty contact list for specific regional competitions	•	•	

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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