2021-2022
CFA INSTITUTE RESEARCH CHALLENGE

LET'S CREATE A PLACE WHERE GREATNESS EMERGES.
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.

Past Five Most Recent Champions

2021  BI Norwegian Business School representing CFA Society Denmark and CFA Society Norway
2020  University of Sydney representing CFA Society Sydney
2019  Ateneo de Manila University representing CFA Society Philippines
2018  University of Lausanne representing CFA Society Switzerland
2017  Barna Business School representing the CFA Institute Research Challenge in Central America

Research Challenge Demographics

Gender Participation

- 36% Female
- 64% Male

University Level

- 30% Graduate
- 70% Undergraduate

CFA Program Candidate Rate

- 89% Eligible CFA Candidates
- 11% Enrolled CFA Candidates

11% of students are CFA candidates at the time of competition kickoff.
HOW DOES THE RESEARCH CHALLENGE WORK?

**Step 1** Invitation
CFA Society invites university to participate

**Step 2** Team Recruiting
Professor recruits students to participate and represent the university

**Step 3** Research
Society announces the subject company and teams begin their research

**Step 4** Mentoring
Teams receive guidance from their industry mentor

**Step 5** Evaluation
Industry professionals evaluate team’s report and presentations through multiple rounds to determine winners.

**Step 6** Regional and Global Finals
Teams advance to New York City for an opportunity to be crowned a champion

**Step 7** Winners
ONE TEAM WINS!

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**Important Dates**

- **Sub-Regional Rounds begin:**
  - 9 March 2022

- **Regional Semifinal rounds:**
  - 5-7 April 2022

- **Regional and Global Finals**
  - 17 May 2022
  - New York, USA
"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
SPONSORSHIP OPPORTUNITIES

**Official Data Service Provider**  
USD 30,000  
Quantity Available: 1

As the exclusive Official Data Service Provider for the Research Challenge, your firm is uniquely positioned as a partner in the competition with premium branding and engagement opportunities. Your firm can highlight your financial data tool by providing student access throughout the competition. You have multiple opportunities to connect with students throughout the competition and receive widespread visibility.

**Industry Partners**  
USD 10,000

Industry Partners receive premier access to the next generation of investment professionals. We work closely with firms to develop a partnership model that aligns with organizational goals whether that’s recruitment, sharing thought leadership with Generation Z, or building awareness with tomorrow’s industry leaders.

**Product Sponsors**  
USD 10,000

Product sponsors are firms, such as exam prep providers or data service providers, interested in introducing their products to a student audience and building brand awareness early in their careers.

**Corporate Sponsors**  
USD 1,000

As a Corporate Supporter, your firm is showing its commitment to a program that is dedicated to the development of students who plan to enter the financial industry. Our Corporate Supporters are recognized on our competition webpage and onsite housekeeping slides for their financial support to the event. Firms will also receive two complimentary event passes for a representative to attend the in-person event.
## SPONSORSHIP OPPORTUNITIES

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<thead>
<tr>
<th>Price</th>
<th>Official Data Service Provider</th>
<th>Industry Partners</th>
<th>Service Provider Sponsors</th>
<th>Corporate Supporter</th>
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### General

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<th>Service</th>
<th>Official Data Service Provider</th>
<th>Industry Partners</th>
<th>Service Provider Sponsors</th>
<th>Corporate Supporter</th>
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<tbody>
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<td>Global student opt-in list</td>
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<td>Global faculty advisor opt-in list</td>
<td>2 time use</td>
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<tr>
<td>Access to global society network hosting Research Challenge</td>
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<td>Live training webinar</td>
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<td>Branding on Research Challenge microsite</td>
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<td>Recognition on the Research Challenge webpages</td>
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<td>Premium branding in Research Challenge operational emails</td>
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<td>Recognition in Research Challenge-related press releases</td>
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<td>Opportunity to share video content during sub-regional round</td>
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<td>Local champion CV book</td>
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### In-Person Event

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<td>Exhibit booth at in-person Regional and Global Finals</td>
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<td>Branding in Research Challenge collateral</td>
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<tr>
<td>Complimentary passes for in-person Regional and Global Finals</td>
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<tr>
<td>Regional and Global Final student opt-in list</td>
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<tr>
<td>Regional and Global Final faculty advisor opt-in list</td>
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<td>Branding onsite at in-person Regional and Global Finals</td>
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<td>Branding during livestream events</td>
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<td>3-5 minute speaking opportunity during Global Final</td>
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<td>Opportunity to participate in student experiences in NYC</td>
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### 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
ABOUT CFA INSTITUTE

• CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organization is a champion of ethical behavior in investment markets and a respected source of knowledge in the global financial community. Our aim is to create an environment where investors’ interests come first, markets function at their best, and economics grow. There are more than 170,000 CFA charterholders worldwide in 164 markets. CFA Institute has nine offices worldwide and there are 161 local societies.

• 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 our Sponsorship team at sponsorships@cfainstitute.org.

CFA Institute Research Challenge
CFAinstitute.org/researchchallenge
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