



Asia Pacific Regional
14–15 March 2017
Westin Grande Sukhumvit
Bangkok, Thailand



Americas Regional
6–7 April 2017
Westin Seattle
Seattle, Washington, USA



EMEA Regional and Global Final
26–28 April 2017
Prague Marriott Hotel
Prague, Czech Republic

2016–2017 CFA Institute Research Challenge

SPONSORSHIP OPPORTUNITIES

EVENT OVERVIEW

The CFA Institute Research Challenge is an annual global competition that provides university students with hands-on mentoring and intensive training in financial analysis. Student teams work to research and analyze a publicly traded company; write a research report highlighted by a buy, sell, or hold recommendation; and then present and defend their findings to a panel of industry experts.

More than 950 university-sponsored teams and more than 4,500 students worldwide participate in one of over 100 local-level competitions. The best and brightest teams advance to regional events held in Asia Pacific, the Americas, and EMEA. Regional winners advance to the Global Final where one team is ultimately crowned champion.

The majority of students spend 100–150 hours researching their assigned company and assembling their report. In addition, students spend more than 30 hours practicing their presentation.

Experience the event from the students' perspective:
<http://bit.ly/2a3E59w>

REGIONAL AND GLOBAL FINAL EVENTS

REGIONAL EVENTS

All local winning teams from across the Asia Pacific, Americas, and EMEA regions will compete in a qualifying round, with the top teams advancing to the evening regional finals. Each regional winner will advance to the global final. Day 1 of each regional event features a kickoff meeting and banquet while day 2 has a semifinal and regional final round with breakfast, lunch, and a closing reception held for students and university faculty.

ABOUT CFA INSTITUTE

CFA Institute is the global community of more than 140,000 investment management professionals working to build an industry in which 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. In short, we are here to lead, support, and connect all who want to create a better investment profession.

We offer a world-class suite of educational offerings to employers, students, working professionals, and regulators who are shaping the future of finance. Through our formal educational programs, professional development courses, and global network of university partners, we aim to deepen financial expertise for the benefit of investors worldwide.

Top employers of CFA Institute members globally:

Bank of America Merrill Lynch · BlackRock · Citigroup · Credit Suisse · HSBC · JPMorgan Chase · Morgan Stanley · Royal Bank of Canada · UBS · Wells Fargo

GLOBAL FINAL

On 28 April in Prague, each of the regional winners will compete to be the 2017 Research Challenge global champion. This grand finale event will be immediately followed by a celebratory dinner and reception.



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



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CFA INSTITUTE RESEARCH CHALLENGE

The following universities advanced from their local-level competitions and competed in the 2016 regional competitions.

View the presentation given by the Global Final Champion, University of Waterloo:
<http://livestream.com/livecfa/global>

2016 UNIVERSITY REGIONAL COMPETITORS

ASIA PACIFIC REGIONAL

Ateneo de Manila University**

Quezon City, Philippines

Auckland University of Technology

Auckland, New Zealand

Chulalongkorn University*

Bangkok, Thailand

Curtin University

Perth, Australia

Foreign Trade University–Ho Chi Minh City Campus

Ho Chi Minh City, Vietnam

The Hong Kong University of Science and Technology

Hong Kong, Hong Kong

Indian Institute of Management, Tiruchirappalli

Tiruchirappalli, India

Institute of Business Administration, Karachi

Karachi, Pakistan

Korea University
Seoul, South Korea

Kyoto University
Kyoto, Japan

National Chengchi University
Taipei, Taiwan

National University of Singapore*

Singapore, Singapore

Peking University
Beijing, China

Peking University HSBC Graduate School of Business
Guangdong, China

Shanghai Jiao Tong University*

Shanghai, China

Southwest University of Political Science & Law
Chongqing, China

Symbiosis Centre for Management and Human Resource Development
Pune, India

Universitas Indonesia
West Java, Indonesia

University of Colombo
Colombo, Sri Lanka

University of Malaya
Kuala Lumpur, Malaysia

University of Melbourne
Victoria, Australia

University of Sydney* Sydney, Australia

EMEA REGIONAL

Aalto University

Aalto, Finland

Academia de Studii Economice Bucuresti

Bucharest, Romania

American University in Bulgaria

Blagoevgrad, Bulgaria

American University in Cairo

Cairo, Egypt

American University of Science and Technology

Beirut, Lebanon

Bahrain Polytechnic

West Riffa, Bahrain

BITS Pilani–Dubai

Dubai, UAE

Boğaziçi University

Istanbul, Turkey

Charles Telfair Institute

Moka, Mauritius

Charles University in Prague

Prague, Czech Republic

Corvinus University of Budapest

Budapest, Hungary

Erasmus University of Rotterdam

Rotterdam, Netherlands

Frankfurt School of Finance & Management

Frankfurt, Germany

IE Business School

Madrid, Spain

King Saud University

Riyadh, Saudi Arabia

KTH Royal Institute of Technology

Stockholm, Sweden

Kuwait University

Kuwait City, Kuwait

Kyiv National Economic University*

Kyiv, Ukraine

National Research University Higher School of Economics, Moscow*

Moscow, Russia

Politecnico di Milano**

Milan, Italy

Strathmore University

Nairobi, Kenya

Trinity College Dublin

Dublin, Ireland

Universidade Católica Portuguesa

Lisbon, Portugal

University of Lausanne

Lausanne, Switzerland

King Saud University

Riyadh, Saudi Arabia

University of Ljubljana

Ljubljana, Slovenia

University of Macedonia

Thessaloniki, Greece

Université Paris–Dauphine

Paris, France

University of Macedonia

Thessaloniki, Greece

University of Stirling

Stirling, UK

Vienna University of Economics and Business*

Vienna, Austria

Wrocław University of Economics*

Wrocław, Poland

*Regional Finalists

**Regional Champions

***Global Final Champion

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2015-2016 UNIVERSITY REGIONAL COMPETITORS

AMERICAS REGIONAL

Appalachian State University
Boone, North Carolina, USA

Arizona State University
Phoenix, Arizona, USA

Barna Business School*
Santo Domingo, Dominican Republic

Belmont University*
Nashville, Tennessee, USA

Binghamton University
Binghamton, New York, USA

Boise State University
Boise, Idaho, USA

Brandeis University*
Boston, Massachusetts, USA

California Polytechnic State University-
San Luis Obispo
San Luis Obispo, California, USA

California State University, Long Beach
Long Beach, California, USA

Canisius College*
Buffalo, New York, USA

College of William & Mary
Williamsburg, Virginia, USA

Colorado State University
Fort Collins, Colorado, USA

Creighton University
Omaha, Nebraska, USA

Drake University
Des Moines, Iowa, USA

Florida Atlantic University
Boca Raton, Florida, USA

Fundação Getulio Vargas-Sao Paulo
São Paulo, Brazil

Grand Valley State University
Allendale, Michigan, USA

Illinois Institute of Technology
Chicago, Illinois, USA

Indiana University Southeast
New Albany, Indiana, USA

Instituto Tecnológico y de Estudios Superiores
de Monterrey-Ciudad de México
Mexico City, Mexico

Loyola University Maryland
Baltimore, Maryland, USA

Marquette University
Milwaukee, Wisconsin, USA

McGill University
Montréal, Quebec, Canada

Millsaps College
Jackson, Mississippi, USA

North Dakota State University
Fargo, North Dakota, USA

The Ohio State University
Columbus, Ohio, USA

Penn State Behrend*
Erie, Pennsylvania, USA

Portland State University*
Portland, Oregon, USA

Saint Mary's University
Halifax, Nova Scotia, Canada

San Diego State University
San Diego, California, USA

Seattle University
Seattle, Washington, USA

Simon Fraser University
Burnaby, British Columbia, Canada

Southern Methodist University
Dallas, Texas, USA

Universidad Adolfo Ibáñez
Santiago, Chile

Universidad Argentina de la Empresa
Buenos Aires, Argentina

Universidad del Pacífico
Lima, Peru

Universidad Externado de Colombia
Bogotá, Colombia

University of Alberta
Edmonton, Alberta, Canada

University of Connecticut
Storrs, Connecticut, USA

University of Georgia**
Athens, Georgia, USA

University of Hawai'i at Mānoa
Honolulu, Hawaii, USA

University of Kansas
Lawrence, Kansas, USA

University of Missouri-Columbia*
Columbia, Missouri, USA

University of San Francisco
San Francisco, California, USA

University of Texas at San Antonio
San Antonio, Texas, USA

University of Utah
Salt Lake City, Utah, USA

University of Waterloo***
Waterloo, Ontario, Canada

University of Wisconsin-Milwaukee*
Milwaukee, Wisconsin, USA

Ursinus College
Collegeville, Pennsylvania, USA

Walsh University
North Canton, Ohio, USA

Whitworth University
Spokane, Washington, USA

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PREMIUM SPONSORSHIPS

GLOBAL PLATINUM SPONSORSHIP

USD \$70,000 | 1 Available
6 Event Passes

The Global Platinum Sponsor is recognized at the highest level as the premier sponsor throughout each event's marketing campaign and live program. Visibly align your firm's support with the mission of the CFA Institute Research Challenge. Your firm is afforded significant brand exposure during each regional event's reception as well as the Global Final closing evening dinner and reception. Your firm will also enjoy co-branding on the bags and lanyards given to all CFA Institute Research Challenge participants, making an impression on the university students, university faculty, and Research Challenge mentors.

GLOBAL GOLD SPONSORSHIP

USD \$30,000 | 1 Available
4 Event Passes

The Global Gold Sponsorship allows your firm to receive significant brand recognition throughout each event's marketing campaign and live program. This sponsorship allows a firm to sponsor the breakfasts, the announcement luncheons, and the finalists headshot station at each regional competition. Your branding will appear on coffee cup sleeves, napkins, table tents, and signage. This opportunity includes a premium exhibit, along with many other deliverables.

PREMIUM SPONSORSHIP OPPORTUNITIES	GLOBAL PLATINUM	GLOBAL GOLD
Price	USD \$70,000	USD \$30,000
Quantity Available	1	1
Deliverables		
Pre-event		
One-time use of university student and university faculty contact list	•	•
Digital recognition in the Supporters section of the CFA Institute Research Challenge event webpage	•	•
Logo recognition on the CFA Institute Research Challenge fact sheet	•	
Recognition in promotional emails and/or print advertisements	•	•
Recognition in social media postings	•	•
Onsite		
Global Final closing evening dinner and reception sponsor (28 April)	•	
Brand recognition during regional receptions	•	
Brand recognition during regional announcement luncheons		•
Bag and lanyard sponsor (bags and lanyards are given to all CFA Institute Research Challenge participants)	•	
Brand recognition during regional kickoff meeting banquets	•	

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PREMIUM SPONSORSHIP OPPORTUNITIES	GLOBAL PLATINUM	GLOBAL GOLD
Invitation to Global Final lunch ceremony (28 April)	•	
Brand recognition at the headshot photo station		•
Advertisement in the event program	Inside Back Cover	Full-Page
Five-minute podium presence during the Global Final competition (28 April)	•	
Banner ad in conference app	•	
Recognition on the conference app	•	•
Premium tabletop exhibit stand*	2	2
Event passes	6	4
Recognition in onsite conference branding (print and/or digital signage)	•	•
Branding in the CFA Institute Research Challenge LiveStream videos	•	•
Post-event		
One-time use of university student and university faculty contact list	•	•
Advertising		
Insertions in the daily CFA Institute <i>Financial NewsBrief: Global Edition</i>	10 Top Stories	5 Top Stories
Print advertising in a CFA Institute member publication**	1 Full-Page Ad	1 Full-Page Ad

*Exhibit selection order is determined by the sponsorship level and the chronological order in which reservation forms are submitted

**CFA Institute Magazine or Financial Analysts Journal®

LOCAL LEVEL COMPETITION SPONSORSHIP SUPPORT

Global Platinum and Global Gold Sponsors can choose to support local level competitions by sponsoring the events in each region. The Local Level Sponsorship allows your firm a direct connection with the participating local member societies. 4,500 students from 76 countries will participate in the competition in the 2016–2017 season. They will compete in one of 110 local competitions hosted by member societies. This sponsorship allows you to gain access to all of these students and member societies while they are still activity participating in the competition at the local level.

ASIA PACIFIC

USD \$11,000

AMERICAS

USD \$26,000

EMEA

USD \$13,000

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EXHIBIT PROGRAM

Exhibitors can generate strong leads and raise their firm's profile among the investment community through this effective opportunity to reach and interact face-to-face with students, university faculty, and CFA Institute volunteers. Display and market your firm's products and services directly to this unique group of future investment management professionals.

PREP PROVIDER EXHIBIT

ASIA PACIFIC

USD \$3,500

3 Event Passes

AMERICAS

USD \$4,500

3 Event Passes

EMEA

USD \$4,000

3 Event Passes

In an increasingly competitive job market, many university students pursue professional certifications and designations once they enter the investment industry. The CFA® designation is a popular option among students who participate in the CFA Institute Research Challenge. Increase your pipeline and promote your company's study prep services to students and university faculty.

PRODUCT EXHIBIT

ASIA PACIFIC

USD \$3,000

2 Event Passes

AMERICAS

USD \$4,000

2 Event Passes

EMEA

USD \$3,500

2 Event Passes

Interact with students and university faculty onsite and give an overview of how your product can assist them with their research and valuation analysis. Exhibitors may arrange and promote free trials for university teams competing in future CFA Institute Research Challenge competitions and work with university faculty to encourage early product adoption among university students in the classroom.

INDUSTRY EXHIBIT

ASIA PACIFIC

USD \$500

2 Event Passes

AMERICAS

USD \$500

2 Event Passes

EMEA

USD \$500

2 Event Passes

Industry exhibitors have the unique opportunity to connect with next generation of financial professionals as they complete their studies and prepare to enter the job market. Among them are future portfolio managers, research analysts, and CFA Institute members who will lead the profession in the future. Firms with an industry exhibit have the opportunity to nominate qualified senior staff to judge student presentations at the regional level. Details of qualifications are available upon request.

SPONSORSHIP PROGRAM

CORPORATE SUPPORTER

ASIA PACIFIC

USD \$500

2 Event Passes

AMERICAS

USD \$500

2 Event Passes

EMEA

USD \$500

2 Event Passes

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 one complimentary event pass for a representative to attend the event.

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SPONSORSHIP OPPORTUNITIES

SPONSORSHIP OPPORTUNITIES	EXHIBIT PROGRAM			SPONSORSHIP PROGRAM
	PREP PROVIDER EXHIBIT	PRODUCT EXHIBIT	INDUSTRY EXHIBIT	CORPORATE SUPPORTER
Price	APAC: USD \$3,500 AMERICAS: USD \$4,500 EMEA: USD \$4,000	APAC: USD \$3,000 AMERICAS: USD \$4,000 EMEA: USD \$3,500	APAC: USD \$500 AMERICAS: USD \$500 EMEA: USD \$500	APAC: USD \$500 AMERICAS: USD \$500 EMEA: USD \$500
Deliverables				
Pre-event				
One-time use of university student and university faculty contact list	•	•	•	
CV book of Research Challenge participants			•	
Digital recognition in the Supporters section of the event webpage	•	•	•	•
Recognition in promotional emails and/or print advertisements	•	•	•	•
Regional judge nomination*			•	
Onsite				
Event passes	3	2	2	2
Tabletop exhibit stand**	•	•	•	
Onsite recognition on print and/or digital signage	•	•	•	•
Recognition on the conference app	•	•	•	•
Post-event				
One-time use of university student and university faculty contact list	•	•	•	
Advertising				
Insertions in <i>CFA Institute Financial NewsBrief: Global Edition</i>	5 Market Activity	5 Market Activity	2 Economics	2 Economics
Print advertising in a CFA Institute member publication***	1 Half-Page Ad	1 Half-Page Ad	40% Discount	40% Discount

*Must meet qualifications and be approved by CFA Institute

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