

Mapping India's finance workforce

**In-demand skills, key qualifications,
and the role of the CFA® Program**



The talent shift

The finance industry in India is evolving rapidly. Employers are seeking talent who combine strong academics, technical expertise, and soft skills to match the increasing standards. This report explores that talent landscape. It highlights the most in-demand skills, hiring trends, qualifications, and upskilling practices shaping today's roles and tomorrow's opportunities. Commissioned by CFA Institute and led by Kantar, the world's leading marketing data and analytics company, this study draws on insights from more than 100 firms across the finance and investment industry.

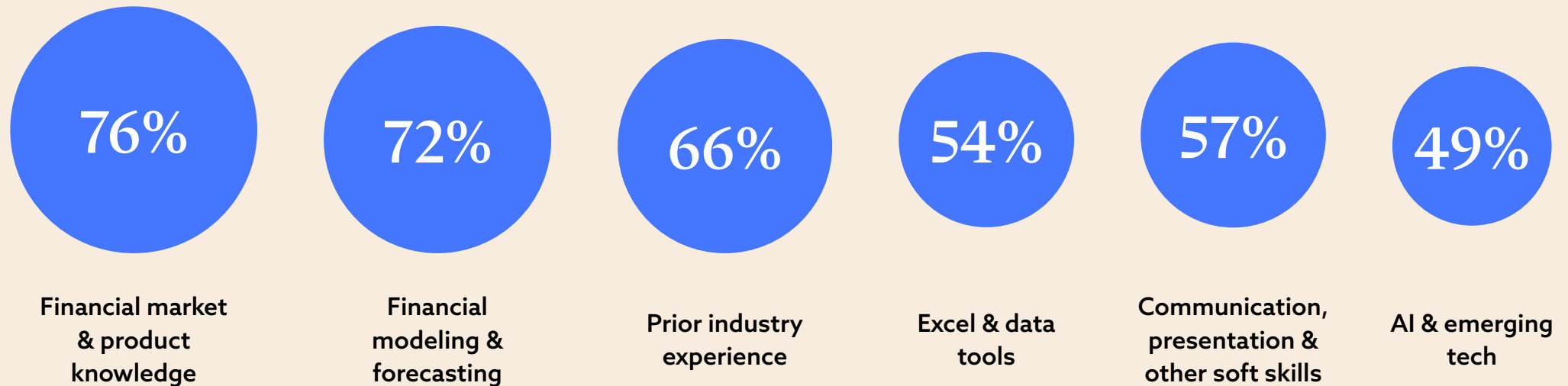
Key findings

- MBA in Finance and CFA® charter are the top qualifications, valued by employers.
54% of employers seek candidates with MBA + CFA® charter.
- CFA® Program is highly valued for entry- and mid-level investment roles, while senior positions prioritize relevant industry experience.
- Employers prefer a mix of technical skills (68% market and product knowledge, 51% financial modelling) and soft skills (49%, such as communication, stakeholder management).

Skills in demand

Employers & employees consider these skills critical to thrive in finance.

Employees



Employers

HIRING PREFERENCES

54%
of employers seek
MBA + CFA[®] charter

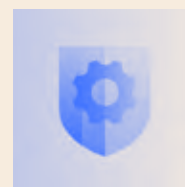
- MBA strengthens strategic thinking, communication, and cross-functional management. The CFA[®] charter strengthens analytical depth, risk management, and expertise of investment concepts. When combined, they create a balanced profile that blends strong leadership skills with advanced financial knowledge.
- MBA + CFA[®] Program is often seen as highly valuable, giving candidates a standout edge in the industry.



47% employees

49% employers

view CFA[®] charter as a top
professional credential



27% employees

27% employers

value FRM



33% employees

40% employers

prefer CA

Why employers prefer MBAs

MBA graduates offer a mix of leadership, strategic thinking, problem-solving, and cross-functional capability. They're trained to stay steady in the swirl of changing markets, shifting priorities, and rapid decisions.

Top 3 reasons hiring managers seek MBA talent:



Holistic thinking

Balance risk, compliance, customer needs, profitability



Leadership readiness

Trained to lead teams, manage change, drive execution



Cross-functional agility

Move seamlessly across departments and business units

70%

value their ability to weigh risks, customer needs, compliance, and business outcomes together.

63%

because they can guide teams, manage change, and steer strategy.

55%

for roles that require moving seamlessly across departments and business units.

Why employers prefer CFA® charterholders

As the gold standard for investment and finance roles, the CFA® Program gives candidates a competitive edge.

Top 3 reasons hiring managers seek candidates having a CFA® designation:



Technical depth

Possess rigorous, intensive knowledge



Global recognition

Trusted across industries and geographies



Integrity

Ethical and professional performance

Employers note that the CFA® designation gives early-career candidates an immediate credibility boost. It often fast-tracks them into investment roles. At leadership levels, work experience and execution capability matter far more than any qualification. 48% of employers say relevant experience becomes more important in the later stages of the career.

65%

Advanced financial expertise: CFA charterholders excel in financial modelling, portfolio construction, and macroeconomic analysis

50%

Regulatory alignment: Their training in ethics and fiduciary responsibility makes them ideal for roles involving compliance and board-level reporting

47%

Job readiness: They are considered plug-and-play for roles like credit analysts, equity researchers, and risk associates, reducing onboarding and training costs

“

Investment banking deals often involve complex equity and debt structures. CFA® charterholders are better equipped than CAs or MBAs to manage these intricacies.”

Employer
Investment banking

MBA and CFA® Program together build well-rounded finance professionals

Professionals across India recognize the CFA® designation for its rigorous foundation in investment analysis and financial decision making. It is especially valued by those looking to complement a broader academic background like an MBA.

Top motivations to complete the CFA® Program:



Credibility

Helps stand out in a crowded job market



Access to network

Opens doors to peers, mentors, and experts across the industry



Structured learning

Deepens knowledge of core and advanced finance concepts



Improved job performance

Boosts confidence by aligning with real-world tasks

71%

of professionals see the CFA® charter as a globally respected qualification. It boosts credibility.

50%

cite access to CFA Society® events and the global alumni network as a key benefit.

50%

indicated the CFA® Program as a complement to existing education or qualifications (e.g., MBA, CA, etc).

42%

say CFA® Program helps career advancement or mobility - better job opportunities, promotions, etc.

Bridging technical excellence with real-world applications

CFA® Program candidates are recognized for technical proficiency; employers underline the rising importance of applied, interpersonal and tech-enabled skills



Financial modelling, real-world analysis, and industry experience



Client interaction, interpersonal, and communication skills



Emerging technologies such as AI and data science



37%

believe CFA® Program candidates need to actively develop interpersonal, communication, and emotional intelligence skills.



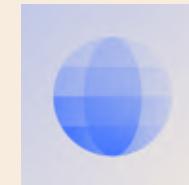
35%

see the CFA® Program as supplementary and other credentials such as an MBA being more relevant.



32%

feel CFA® Program candidates need to strengthen organizational leadership, change management, and regulatory expertise.



29%

say the candidates should deepen their understanding of Indian regulations, banking norms, or local market dynamics.

Learn more about the CFA® Program
cfainstitute.org/programs/cfa-program