

**CFA Society
Istanbul**

Türkiye Azerbaijan Georgia



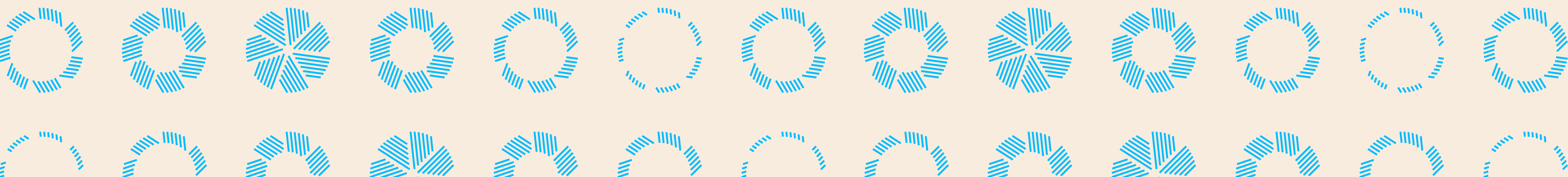
TABLE OF CONTENTS

CFA INSTITUTE

THE CFA CHARTER

CFA PROGRAM EXAMS

CFA SOCIETY ISTANBUL



To lead the investment profession globally by promoting the highest standards of **ethics, education, and professional excellence** for the **ultimate benefit of society**.



A UNIQUE FORCE WITHIN THE INVESTMENT PROFESSION

- A global not-for-profit organization
- The world's largest association of investment professionals
- Industry leader promoting the highest standards of ethics, education, and professional excellence
- A vast global network of members, societies, and relationships with key financial organizations around the world

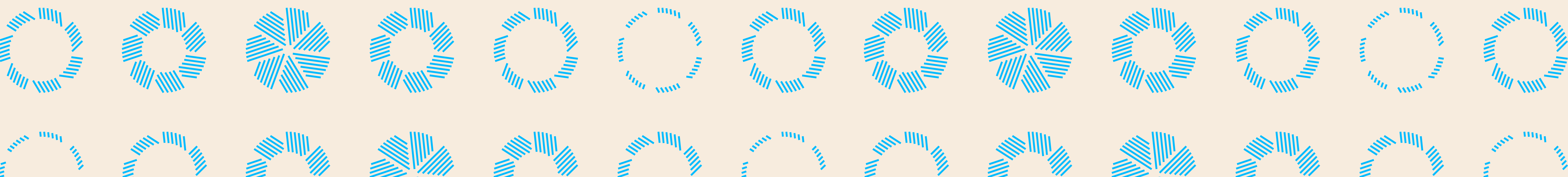
TABLE OF CONTENTS

CFA INSTITUTE

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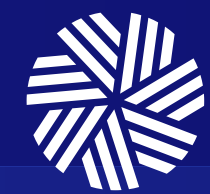
CFA PROGRAM EXAMS

CFA SOCIETY ISTANBUL



THE CFA® CHARTER

Building a Stronger, Sustainable,
Investment Profession



CFA Society
Istanbul

Türkiye Azerbaijan Georgia

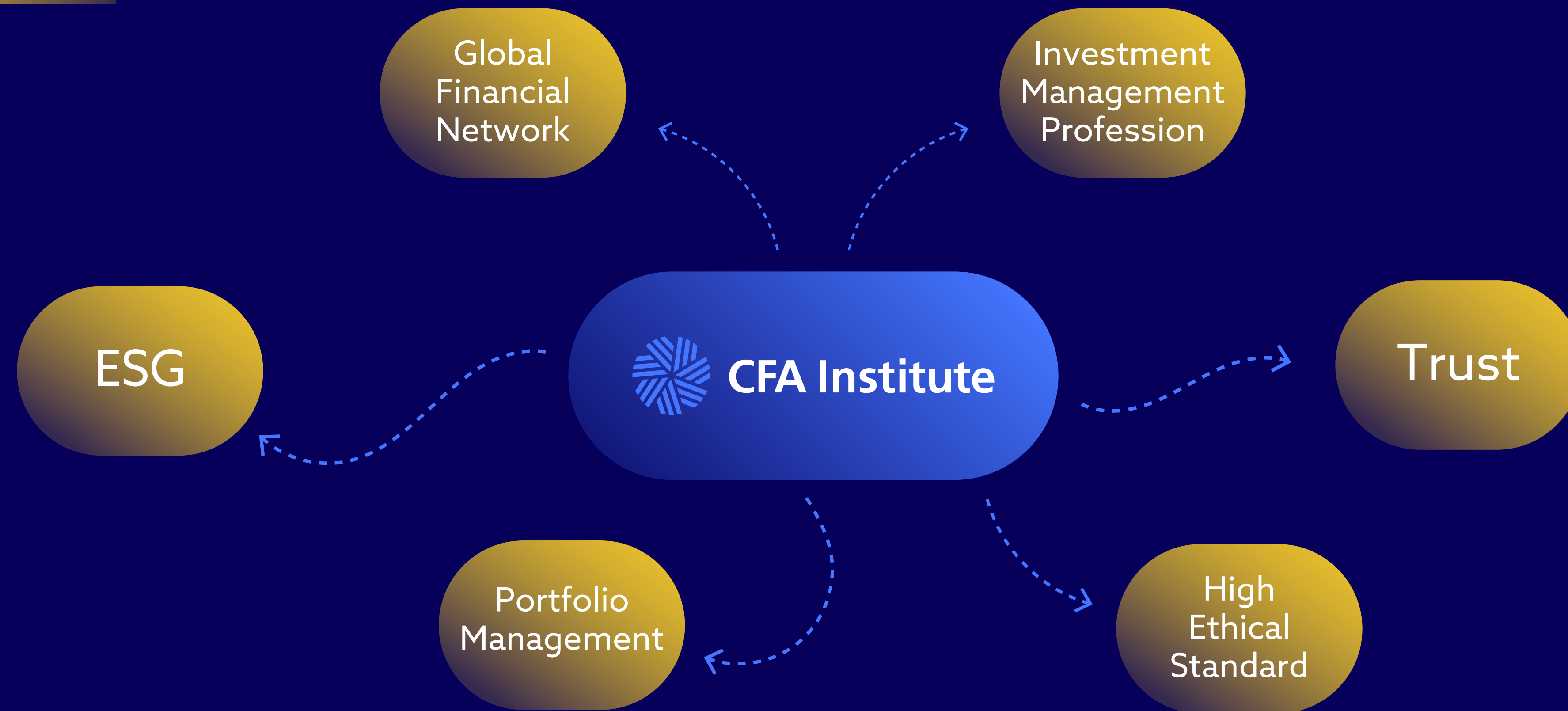
« Among the countless finance degrees around the world,
the Chartered Financial Analyst qualification has
become the **gold** standard. »

Financial Times

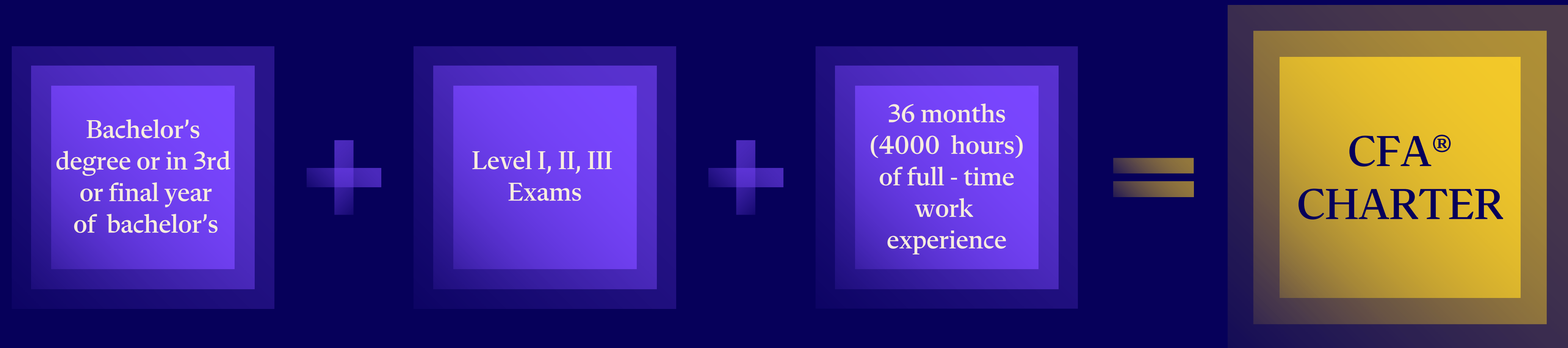
CFA® CHARTER: THE GOLD STANDARD

- ◆ Graduate-level investment credential
- ◆ There are nearly 200,000 CFA® Charterholders worldwide in more than 160 markets.
- ◆ Recognized by 60 regulators in more than 40 markets as a Proxy for meeting certain licensing requirements, including Capital Markets Board of Türkiye
- ◆ More than 600+ universities around the world incorporate the CFA Program curriculum into their degree programs

WATCH NOW

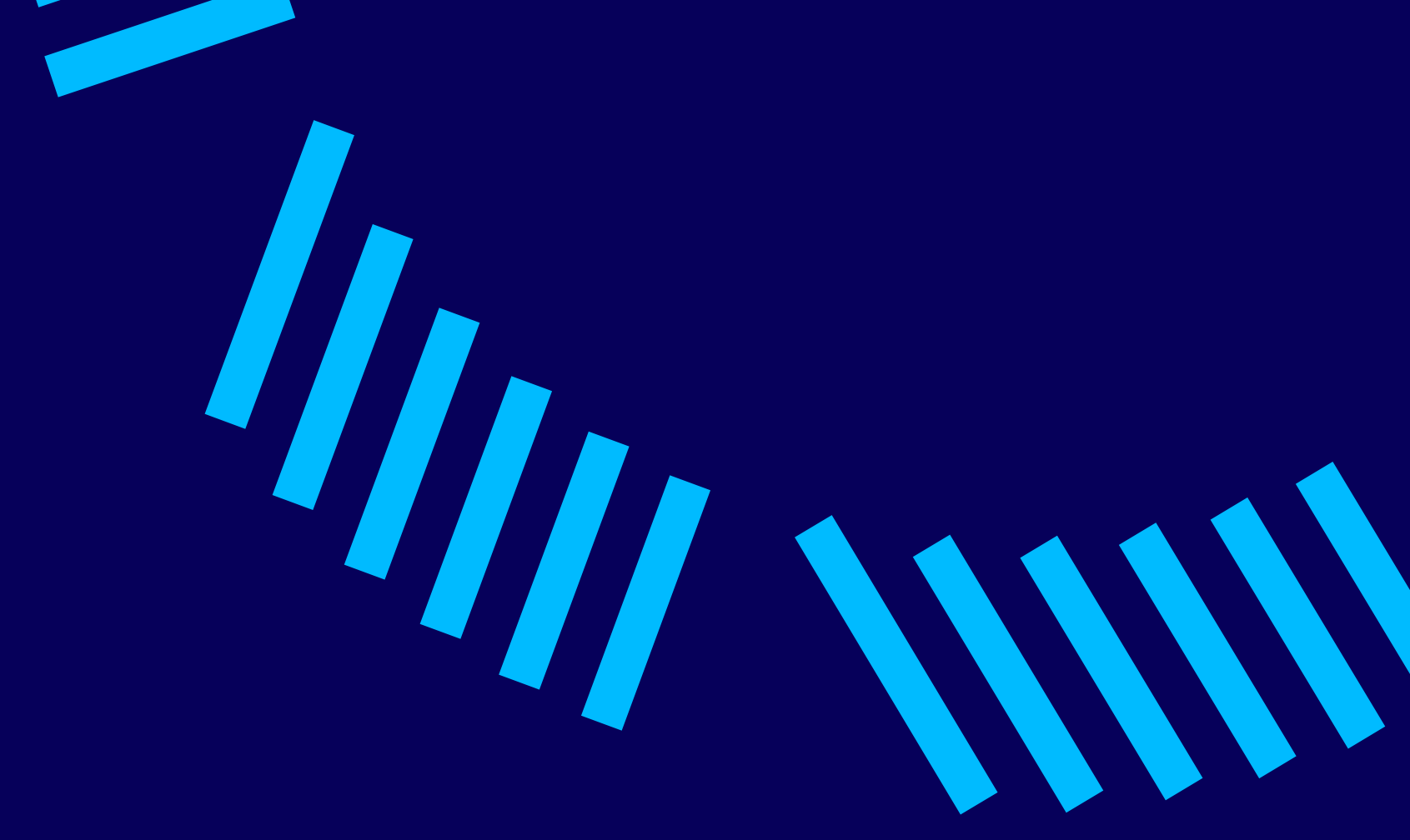


THE CFA[®] EQUATION

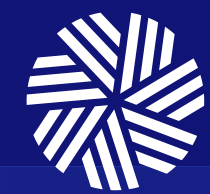


WHAT YOU LEARN AS A CFA® CHARTERHOLDER

- Investment (equity and fixed income) analysis
- Portfolio management
- Wealth planning
- Economic theory
- Alternatives and Derivatives
- Performance Measurement & evaluation
- Risk Management
- Financial Reporting
- Quantitative Methods
- One more!



$\sqrt{\text{THE CFA}^{\text{®}} \text{CHARTER}} = \text{ETHICS}$



CFA Society
Istanbul

Türkiye Azerbaijan Georgia

CODE OF ETHICS

I will:

Act with integrity, competence, diligence, respect, and in an ethical manner with the public, clients, prospective clients, employers, employees, colleagues in the investment profession, and other participants in the global capital markets.

Place the integrity of the investment profession and the interests of clients above my own personal interests.

Use reasonable care and exercise independent professional judgment when conducting investment analysis, making investment recommendations, taking investment actions, and engaging in other professional activities.

Practice and encourage others to practice in a professional and ethical manner that will reflect credit on ourselves and the profession.

Promote the integrity and viability of the global capital markets for the ultimate benefit of society.

Maintain and improve my professional competence and strive to maintain and improve the competence of other investment professionals.

Adhere to this code of ethics.

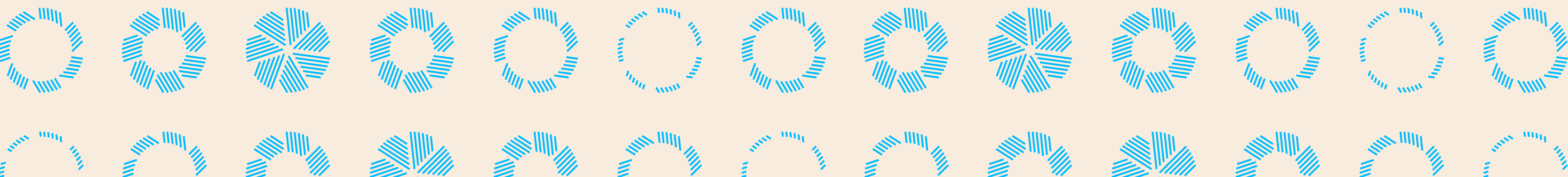
TABLE OF CONTENTS

CFA INSTITUTE

THE CFA CHARTER

CFA PROGRAM EXAMS

CFA SOCIETY ISTANBUL



3 CFA® PROGRAM EXAMS

LEVELS	FORMAT	GRADING PROCESS	QUESTIONS
Level I February, May, August, November Exams	Multiple choice	Machine graded; Extensive sampling	180 multiple choice questions, split between two 135-minute sessions
Level II May, August, November Exams	Vignette-supported multiple choice	Machine graded; Extensive sampling	22 item sets comprised of vignettes with 88 accompanying multiple-choice questions
Level III February, August Exams	Vignette-supported essay; vignette-supported multiple choice	Item Sets, Machine graded; extensive Sampling; Constructed Response Graded by teams of Charterholders	Either 6 item sets and 5 essay sets or 5 item sets and 6 essay sets

SCHOLARSHIPS

TYPE	WHO IS THIS FOR?	REDUCTIONS
ACCESS	For individuals who may not be able to afford the program fees and have not yet registered for their next exam.	Exam registration reduced to USD400.
STUDENT	For students currently attending an affiliated university and have not yet registered for their next exam.	Exam registration reduced to USD600. + Additional scholarship from CFA Society Istanbul Board
PROFESSOR	For full-time college/university professors or administrators and department heads who teach a minimum number of credit hours at qualified institutions and have not yet registered for their next exam.	Exam registration reduced to USD600.
REGULATOR	For employees of a financial regulator, central bank, securities commission, stock exchange, SRO, or government entity.	Exam registration reduced to USD600.

CFA® PROGRAM EXAM MATERIALS

When you register for the CFA Program, you will gain access to a variety of study tools and resources to help you prepare for the exam. We will support you with our learning ecosystem and community along your path to become a CFA Charterholder.

- Official program curriculum
- Study sessions for each level
- Custom study plans designed just for you
- Practice questions throughout the curriculum
- Mock exam, mimicking the exam-day experience
- Study resources and tips

LEVEL I CFA® PROGRAM EXAM STRUCTURE

Structure & Duration

The Level I exam consists of 180 multiple choice questions, split between two 135-minute sessions (session times are approximate). There is an optional break between sessions.

First session (2 hours, 15 minutes): 90 multiple choice questions, covering the topics of ethics & professional standards, quantitative methods, economics, and financial statement analysis

Second session (2 hours, 15 minutes): 90 multiple choice questions, covering the topics of corporate issuers, equity, fixed income, derivatives, alternative investments and portfolio management

How to Study for the CFA Level I Exam

The best way to study for the CFA Level I Exam is to follow the CFA program curriculum and give yourself enough time to learn the material in your ideal learning style. [Here are some resources candidates have listed as being most helpful for their exam preparation:](#)

- CFA Program curriculum
- CFA Institute learning ecosystem (LES)
- CFA Institute online mock exams
- CFA Program approved prep providers
- CFA Program curriculum end-of-reading practice problems
- Study groups
- CFA Program Practice Pack
- [CFA Society Istanbul Hybrid Prep Courses](#) (10 days, 5 weekends, like a review course, between March-April and September-October, twice a year)

LEVEL I CFA® PROGRAM EXAM STRUCTURE

TOPIC	EXAM WEIGHT
Ethical and Professional Standards	15-20%
Quantitative Methods	6-9%
Economics	6-9%
Financial Statement Analysis	11-14%
Corporate Issuers	6-9%
Portfolio Management	8-12%
Equity Investments	11-14%
Fixed Income	11-14%
Derivatives	5-8%
Alternative Investments	7-10%

Question Format

Two basic formats are used:
1.Sentence completion with three unique choices
2.Questions with three unique choices

LEVEL II CFA® PROGRAM EXAM STRUCTURE

Structure & Duration

The CFA Level II exam consists of 22 item sets comprised of vignettes with 88 accompanying multiple-choice questions.

The Level II exam is standardized with 11 item sets for each session, for a total of 22 on the exam. Twenty are scored, and two are questions we are trialing that will not be scored.

Multiple-choice questions in each item set must be answered based on the information in the vignette.

The Level II exam will be 4 hours and 24 minutes, split into two equal sessions of 2 hours and 12 minutes, with an optional break in-between.

How to Study for the CFA Level II Exam

- Make sure you know how to use the calculator features needed to address the learning outcome statements (LOS).
- Answer all questions. There is no penalty for incorrect answers.
- Take a CFA Level II mock exam to practice answering exam questions. This experience is designed to mimic the actual exam-day.
- Learn how hardware/software at the test centers may impact your exam-day experience.
- CFA Society Istanbul Hybrid Prep Courses (10 days, 5 weekends, like a review course, between March-April and September-October, twice a year)

LEVEL III CFA® PROGRAM EXAM STRUCTURE

Structure & Duration

The Level III exam consists of item sets and constructed response (essay) sets. Both of these question types are comprised of vignettes with accompanying multiple-choice items for item sets and constructed response items for essay sets. All questions must be answered based on the information in the vignette.

Each session will have either 6 item sets and 5 essay sets or 5 item sets and 6 essay sets. This mixed distribution of item types across the two exam sessions creates a more-balanced delivery of questions throughout the exam. Overall, the Level III exam contains 11 item sets and 11 essay sets for 12 points each.

The Level III exam will be 4 hours and 24 minutes, split into two equal sessions of 2 hours and 12 minutes, with an optional break in-between.

How to Study for the CFA Level III Exam

- Make sure you know how to use the calculator features needed to address the learning outcome statements (LOS).
- Answer all questions. There is no penalty for incorrect answers.
- Take a mock exam in the Learning EcoSystem to practice answering exam questions.
- Familiarize yourself with the software features of the exam in this software tutorial. Learn how hardware/software at the test centers may impact your exam-day experience.
- Dress comfortably.

WAIVERS

Your current or past participation in CFA Institute educational programs may enable you to **waive certain requirements** for other financial credentialing products, services, or organizations. Explore exemptions and waivers-offered by regulators and certification programs in 40 countries and regions and available to members and candidates.

Recognition from Regulators

CFA Institute clears regulatory hurdles for our members around the world.

Waivers and Exemptions from Universities

You may be eligible for a waiver of certain university courses or for GRE or GMAT entrance exams required for MBA programs.

MYTHS

VS

FACTS

MYTHS

- The question writers look at what prep courses are saying and test the opposite.
- The question writer is trying to trick me.
- Questions that nearly everyone got right are thrown out.
- Questions that nearly everyone got wrong are thrown out.
- You must finish the program within a certain time frame, so you must take the exams in consecutive sittings.
- A month is plenty of time to study.
- I do not need to read the assigned curriculum – I already do this stuff at work.
- A friend's prep notes from three years ago are good enough.
- CFA Institute has a targeted pass rate.
- The minimum pass score is 70%

FACTS

- Start early, create a schedule, and prepare for about 300 hours
- Study the Learning Outcome Statements (LOS)
- Practice using end-of-reading question, mock exams, and sample exams
- Make sure rest the day before exam
- Show up on exam day and answer all questions.
- Listen carefully to announcements and pre-exam day communications
- Watch your time and pace yourself
- Stay calm
- Get the ethics right
- Tell your friends and family about your
- commitment to the CFA® program

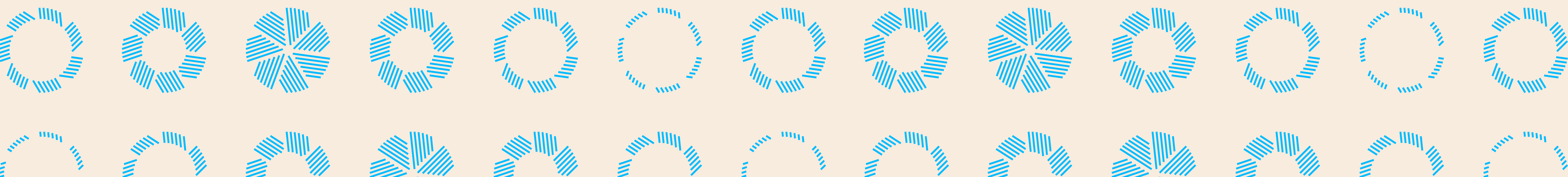
TABLE OF CONTENTS

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Türkiye Azerbaijan Georgia

- ◆ Established in 2003
- ◆ 450 Members
- ◆ 350 CFA Charterholders
- ◆ Outreach Activities: Universities, Employers, Regulatory
- ◆ Conferences & Events
- ◆ Jobline & Internships
- ◆ Whatsapp Groups for Candidates
- ◆ Newsletters
- ◆ CFA Societies Passport Program
- ◆ Prep Courses

CFA® SOCIETIES PASSPORT PROGRAM

Ongoing professional education, volunteer opportunities, and great networking events are just a few of the benefits offered by CFA Societies.

Whether you're a current CFA Institute member, a CFA Program candidate, a partnering institution, or just seeking additional information, [use the global society directory to connect with a local member society on your travels, to find and attend society events, and to expand your professional network.](#)



Türkiye Azerbaijan Georgia

19 CFA Program Affiliated Universities



Bilgi University, Bilkent University, Boğaziçi University, Dokuz Eylül University, Galatasaray University, ISET, İstanbul Commerce University, İstanbul University, İzmir University of Economics, Kadir Has University, Koç University, ODTÜ, Piri Reis University, Sabancı University, TED University, TOBB University of Economics & Technology, Yeditepe University, Yıldız Technical University.

Introduction to CFA Institute Research Challenge

What is the CFA Institute Research Challenge?

- An annual global competition organized by CFA Institute.
- Provides university students with hands-on mentoring and training in financial analysis, valuation, and professional ethics.
- Participants assume the role of a research analyst, producing a detailed equity research report and delivering a presentation.
- Evaluated on analytical, valuation, report writing, and presentation skills.

Highlights:

- 2024-2025 Subject Company: EnerjiSA
- 25 Universities
- 158 Students
- 47 Students from Outside Türkiye
- 34 Industry Mentors (Since there were 34 teams)
- 29 Academic Advisors



CFA INSTITUTE LOCAL RESEARCH CHALLENGE

What It Is

The CFA Institute Research Challenge is an annual global competition that provides university students with hands-on mentoring and intensive training in financial analysis and professional ethics. Each student will be tested on their analytical, valuation, report writing, and presentation skills. They gain real-world experience as they assume the role of a research analyst.

How It Works

Local level competitions are organized and judged by CFA Institute society members and volunteers who function as local hosts.

The winning university team from each local competition advances to the sub-regional competition.

HISTORY OF LOCAL RESEARCH CHALLENGE

	Year	Subject Company	Winner
1	2008-2009	TAV Havalimanları	Koç University
2	2009-2010	Mardin Çimento	Sabancı University
3	2010-2011	Trakya Cam	Sabancı University
4	2011-2012	TOFAS	İzmir Ekonomi University
5	2012-2013	THY	ODTÜ
6	2013-2014	Ulker	Koç University
7	2014-2015	Turkcell	Özyeğin University
8	2015-2016	Tupras	Boğaziçi University
9	2016-2017	Arçelik	Özyeğin University
10	2017-2018	FORD	Galatasaray University
11	2018-2019	Pegasus	Galatasaray University
12	2019-2020	MAVI Giyim	Özyeğin University
13	2020-2021	Logo Yazılım	Galatasaray University
14	2021-2022	Garanti BBVA	İstanbul Bilgi University & Koç University
15	2022-2023	Şişecam	Özyeğin University & Koç University
16	2023-2024	Coca Cola İçecek	ODTÜ & Koç University
17	2024-2025	Enerjisa Enerji	ADA & Istanbul Bilgi University
18	2025-2026	Türk Telekom	YOU



2025 CFA INSTITUTE LOCAL RESEARCH CHALLENGE

MACROECONOMY SESSION



HANDE ŞEKERÇİ
ECONOMIST AT IS ASSET
MANAGEMENT

22 OCTOBER 2024
TUESDAY
18.00 - 19.30
TURKISH TIME
ONLINE

Sponsor: İŞ PORTFÖY | Subject Company: ENERJİA | Data Sponsor: EquityRT | CFA Society Istanbul
Türkiye Azerbaycan Georgia

2025 CFA INSTITUTE LOCAL RESEARCH CHALLENGE

ESG SESSION



IRMAK PINAR
ENERJISA, SUSTAINABILITY
GROUP MANAGER

23 OCTOBER 2024
WEDNESDAY
18.00 - 19.30
TURKISH TIME
ONLINE

Sponsor: İŞ PORTFÖY | Subject Company: ENERJİA | Data Sponsor: EquityRT | CFA Society Istanbul
Türkiye Azerbaycan Georgia

2025 CFA INSTITUTE LOCAL RESEARCH CHALLENGE

REGULATORY SESSION

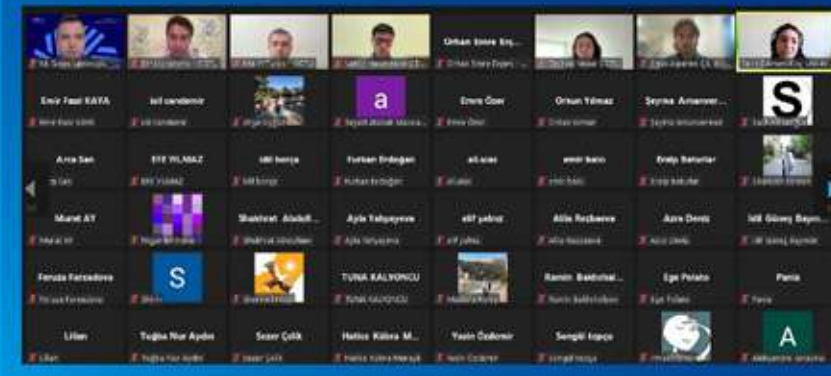


SELİM DEMİRCAN
ENERJISA, FINANCE DIRECTOR
IN DISTRIBUTION BU

30 OCTOBER 2024
WEDNESDAY
18.00 - 19.30
TURKISH TIME
ONLINE

Sponsor: İŞ PORTFÖY | Subject Company: ENERJİA | Data Sponsor: EquityRT | CFA Society Istanbul
Türkiye Azerbaycan Georgia

VALUATION BOOTCAMP



CFA Society
Istanbul
Türkiye Azerbaycan Georgia

LOCAL RESEARCH CHALLENGE 2024-2025 KICK-OFF MEETING

11 NOVEMBER 2024, FRIDAY - LEVENT / HYBRID

- 08.30 - 09.30 Welcome Breakfast
- 09.30 - 09.45 Opening Speeches
Alper Alkan, CFA, President, CFA Society Istanbul
Burak Sezercan, CEO, İş Portföy
- 09.45 - 10.45 Financial Performance & Outlook + Q&A
Philip Ulbrich, CFO, Enerjisa Enerji
- 10.45 - 11.15 Coffee Break
- 11.15 - 11.45 Enerjisa Retail Activities and Growth Projections
Ersin Esentürk, General Manager of Retail Sales Companies
- 11.45 - 12.15 Q&A to IR Team
Cem Gökkaya, Treasury, Risk, IR & Tax Director, Enerjisa Enerji
Martin Jäger, Head of IR, Enerjisa Enerji
- 12.15 - 12.30 Challenge Process and Rules
Ece Mandacı Baysal, CFA, Board Member, CFA Society Istanbul
- 12.30 - 13.30 Networking Break & Lunch & Gifts

Sponsor: İŞ PORTFÖY | Subject Company: ENERJİA | Data Sponsor: EquityRT | CFA Society Istanbul
Türkiye Azerbaycan Georgia

CFA Institute Local Research Challenge Kick-Off Meeting 2024-2025

CFA Society
Istanbul

Türkiye Azerbaycan Georgia

CFA Institute Local Research Challenge

Local Final 2024-2025



ADA University



Istanbul Bilgi University



Izmir University of Economics



Koç University



Yıldız Technical University

TIMELINE FOR THE 2025-2026 SEASON

OCTOBER

- 21 October 18.00-19.30 Rasyonet Training with Gökay Ercan
- 22 October 18.00-19.30 Macroeconomy Session with Hande Şekerci from Is Asset Management
- 25 October 10.00 - 14.30 Saturday Valuation Bootcamp & Bilgi & ADA experience
 - 10.00-11.00 Burak İşyar, CFA*
 - 11.15-12.45 Emre Sezan, CFA*
 - 13.00-14.00 Emir Bölen, CFA*
 - 14.00-14.30 Bilgi & ADA experience sharing from last year's champion teams.*
- 30 October 18.00-19.30 ESG/Regulation Session with Gülsen Ayaz
- TBA October 18.00-19.30 Technology/Marketing

NOVEMBER

- 7 November Friday Kick-off Meeting 10-11am start, 4pm finish in Istanbul (in person & online) (in the morning; further details will be provided later)
- Report-writing process starts with the Kick-Off Meeting
- Industry mentors get assigned to teams
- 24-28 November Q&A (Please send us 5 questions maximum for each team.)

JANUARY

- TBA January 2026 Deadline Final reports submitted for grading
- TBA January 2026 Finalists announced

FEBRUARY

- TBA February 2026 Local Final

MARCH

- 4 March 2026 Sub-regional Kickoff
- 26 March 2026 Sub-regional Announcement
- 31 March-1 April 2026 Regional Semifinals

APRIL

- 2-3 April 2026 Regional Finals

MAY

- Global Final

QUANT AWARDS

The CFA Quant Awards is a prestigious international competition where university students and interns present original research in quantitative finance — from mathematical modelling and econometric analysis to machine learning applications. The latest edition is organized with the participation of CFA Societies in Istanbul, Belgium, France, Ireland, Italy, the Netherlands, and Spain. Over 50 papers were submitted, with the top 3 winning a prize and presenting their work at the Award Ceremony.

What is quantitative finance?

Quantitative finance applies mathematical and statistical models, as well as large datasets, to analyze financial markets and securities. Topics often include portfolio optimization, risk modelling, algorithmic trading, and applications of AI/ML in finance.

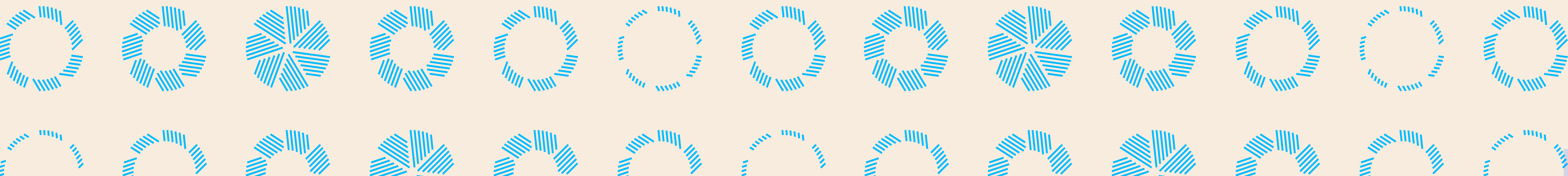
ELIGIBILITY

Open to university students and interns in quantitative finance regardless of speciality. Professional experience must be limited to internships (maximum 3 years). Applications are free.

FORMAT & DATES

Reports must be in English and 5–7 pages long (excluding appendices). Registration typically opens in *May each year, with about **three months to submit* your paper after registering.

[Click here for more info!](#)



11th CFA CEE INVESTMENT CONFERENCE

29 May



11th CFA CEE INVESTMENT CONFERENCE

29 May



CFA Society Istanbul proudly hosted the 11th CFA Central and Eastern European (CEE) Investment Conference on Thursday, May 29, 2025, at the Sabancı Center. This prestigious full-day event, themed “The Bridge from the Region to the World,” convened influential voices from finance, policy, and investment to examine the forces shaping regional and global economies.

The conference drew over 450 participants, with nearly 15 countries represented. Approximately one-third of the attendees were CFA charterholders, underscoring the event’s relevance and professional depth within the global investment community. With the contributions of 37 distinguished speakers, the program provided unique insights and thought-provoking discussions on the key issues facing our industry today.

Events & Webinars



14 January
Speed Networking



18 March
Iftar



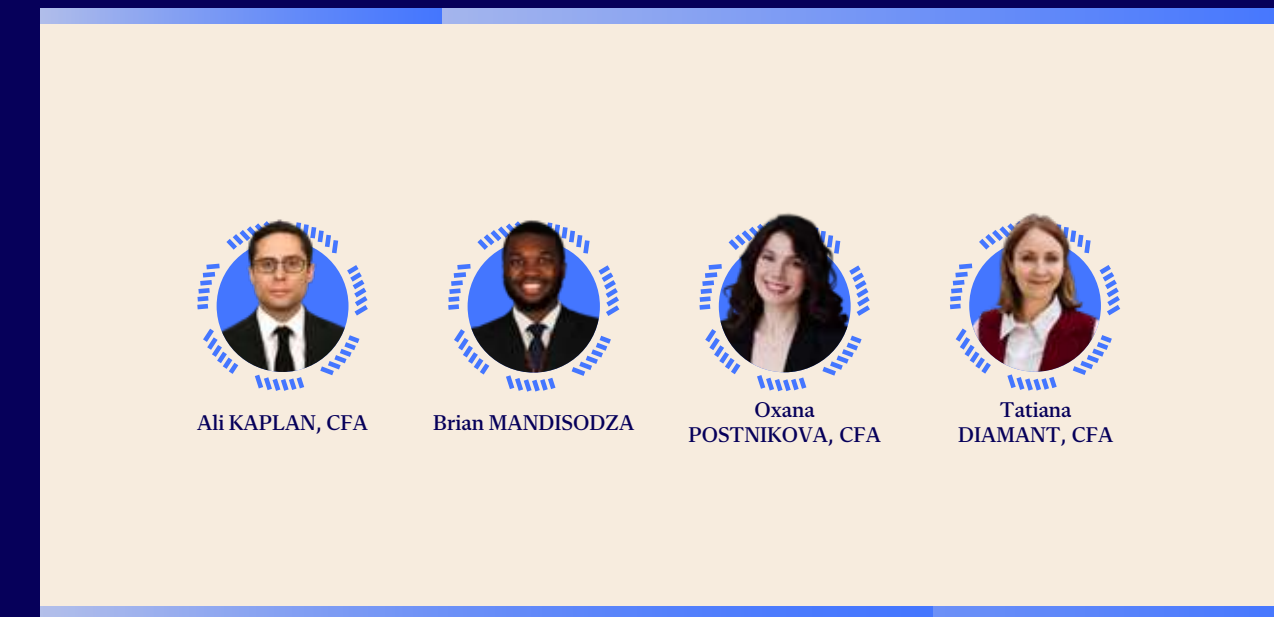
4-7 May
CFA Institute Annual Conference Chicago



17 June
General Assembly Meeting



10 April
Candidate Experience Sharing Session



28 July
L3 Candidate Experience Sharing Session

Events & Webinars



13 August

Networking Event with Nisan Ak

15th Macroeconomic Expectations Panel



Women in Finance Luncheon



University Outreach



11 February
Sabancı University



17 March
Özyeğin University



19 March
Kadir Has University



20-21 March
ODTU Career Fair



20-21 March
ODTU Career Fair



24 March
Galatasaray University

University Outreach



12 May
Istanbul Bilgi University



28 May
Galatasaray University Luncheon & Roundtable



28 May
Galatasaray University Luncheon & Roundtable



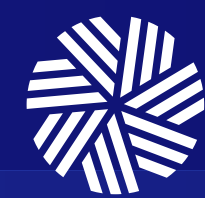
12 June
MEF University



8 October
Sabancı University

CFA Hybrid Review Courses for L1 and L2

6 September - 5 October



CFA Society
Istanbul

Türkiye Azerbaijan Georgia

Employer Outreach



26 May
ING HR Luncheon & Roundtable



26 May
Koç Holding Luncheon & Roundtable



10 June
Ernst & Young



25 June
TEB Asset Management



26 June
Ziraat Asset Management



9 July
Sabancı Holding

Employer Outreach



10 July
IS Investments



17 July
Borusan



21 July
Koç Holding



23 July
Yapı Kredi



24 July
Kuveyt Türk Portföy



24 July
Ak Investment

Employer Outreach



25 July
Turkish Airlines



29 July
Anadolu Efes



31 July
Denizbank / Deniz Portföy



1 August
Tosyalı Holding



11 August
Garanti Portföy



13 August
Ak Asset Management

Employer Outreach



13 August
İs Asset Management



27 August
CCI



27 August
İs Asset Management



28 August
Halk Bankası



1 September
Türk Telekom



2 September
Burgan Bank

Employer Outreach



4 September
QNB Bank



4 September
CCI



22 September
Ak Sigorta



24 September
HSBC



25 September
Burgan Bank

Regulator Outreach



24 March

The Central Bank of the Republic of Türkiye



27 March

Banking Regulation and Supervision Agency



16 April

International Corporate Governance Network



26 May

Borsa Istanbul



27 May

Capital Markets Board of Türkiye



23 June

Central Bank of the Republic of Türkiye

Regulator Outreach



26 August
SPL



24 September
The Investment and Finance Office of
the Presidency of the Republic of Türkiye

STUDENT ENGAGEMENT

BE AN AMBASSADOR at your university for CFA Society, get in contact with us & university clubs, academicians and plan events. Invite us to your university career days, conferences and panels! **ATTEND** CFA Society Istanbul's & CFA Institute's open-to-all and university outreach events. **LEARN MORE & ASK** us about the CFA Program, Certificate in ESG Investing, events or anything you are curious about. **FOLLOW US ON SOCIAL MEDIA** @cfaistanbul and **REACH US!** **VOLUNTEER** for events! Join us **EMAIL US** at info@cfaturkishsociety.org.

PARTICIPATE IN RESEARCH CHALLENGE WITH YOUR FRIENDS!

Get a chance to have internship in the end and advance to the next regional and global levels!

If you are enrolled or are planning to enroll in the CFA Program, **APPLY** for scholarships, **ATTEND** our prep courses which are announced through our social media! Also, if you are a student of an affiliated university, don't forget to **apply for Student Scholarship**, **get one+ if you succeed**, CFA Society Istanbul has an **ADDITIONAL scholarship** for you!

Climate Risk, Valuation, and Investing Certificate

CERTIFICATE AT A GLANCE



The self-paced version is available at any time.

2025 Cohort Start Dates

6 January 2025

7 April 2025

7 July 2025

(see page 2 for cohort registration details)



Approximately 100 hours of study time. Quizzes and a final assessment exam consisting of 60 multiple choice questions.



Online course and final assessment. Self-paced certificate must be completed within 12-months.



A foundational knowledge and skills in financial statement analysis and valuation are recommended.



Certificate and digital badge from globally recognized CFA Institute.



USD 1,272 institutional rate*

Develop the competencies and skills to integrate climate-related investing principles into the investment process. The Climate Risk, Valuation, and Investing Certificate curriculum develops knowledge and skills in climate investing and teaches you how to apply climate considerations to valuation and portfolio construction across asset classes.

Learning experience

Learners will progress through five courses:

Course 1: Climate Science, Risks and Regulations

Course 2: Transition Finance

Course 3: Climate and Valuation: Listed Equity and Debt

Course 4: Climate and Valuation: Alternatives

Course 5: Portfolio Management & Stewardship for Climate Risk

To earn the certificate, learners must complete all courses and pass a final assessment. Once the certificate has been completed, learners will receive a shareable certificate and digital badge.

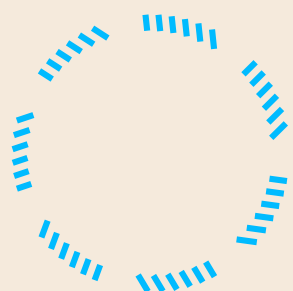
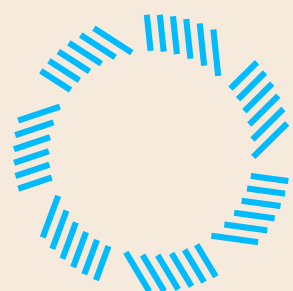
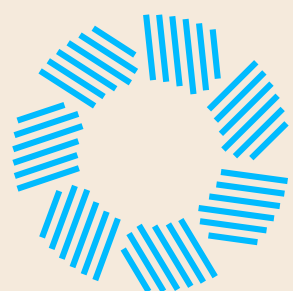
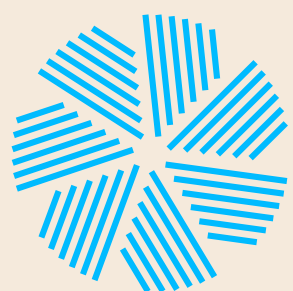
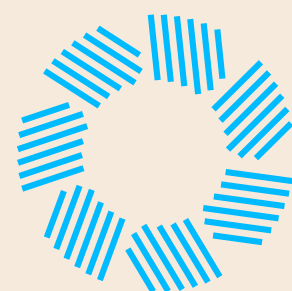
Who should enroll?

The Climate Risk, Valuation, and Investing Certificate is suited for investment professionals who conduct valuation, modeling, and scenario analysis, and integrate climate considerations into portfolio construction.

Foundational knowledge and skills in financial statement analysis, valuation, and portfolio construction are recommended.

Example of relevant roles:

- Analysts (Equity, Credit, Funds, etc.)
- Portfolio Managers
- Private Wealth Managers
- Product Specialists
- Relationship Managers



*Subject to a CFA Institute corporate billing agreement.

Recommended Certificate in ESG Investing

The Certificate in ESG Investing equips you with the knowledge and skills necessary to incorporate ESG considerations into the investment decision-making process; you can better support client demand and play an important role in prioritizing sustainability, ethical practices, and social responsibility.

Position your company to thrive. Contact your CFA Institute business manager to learn how you can easily give your firm's investment professionals access to the Climate Risk, Valuation, and Investing Certificate. | [See more details about the Climate Risk, Valuation, and Investing Certificate.](#)

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This Certificate provides:

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- An introduction to the key roles and functions in investment management
- The global forces affecting the evolution of the investment market
- Real-world scenarios that help turn abstract concepts into living stories

Key facts:

- Beginner level certificate
- Format: online, self-paced
- Price: \$350
- Time commitment: 60-90 hours to complete
- Content access: 12 months
- Certificate of completion



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USD 79



BOOK RECOMMENDATIONS

*READ WSJ, NYTIMES & FT.

*THE INTELLIGENT INVESTOR, BENJAMIN GRAHAM

*THINKING FAST AND SLOW, DANIEL KAHNEMAN

*FORTUNE'S FORMULA, WILLIAM POUNDSTONE

*ONE UP ON WALL STREET, PETER LYNCH

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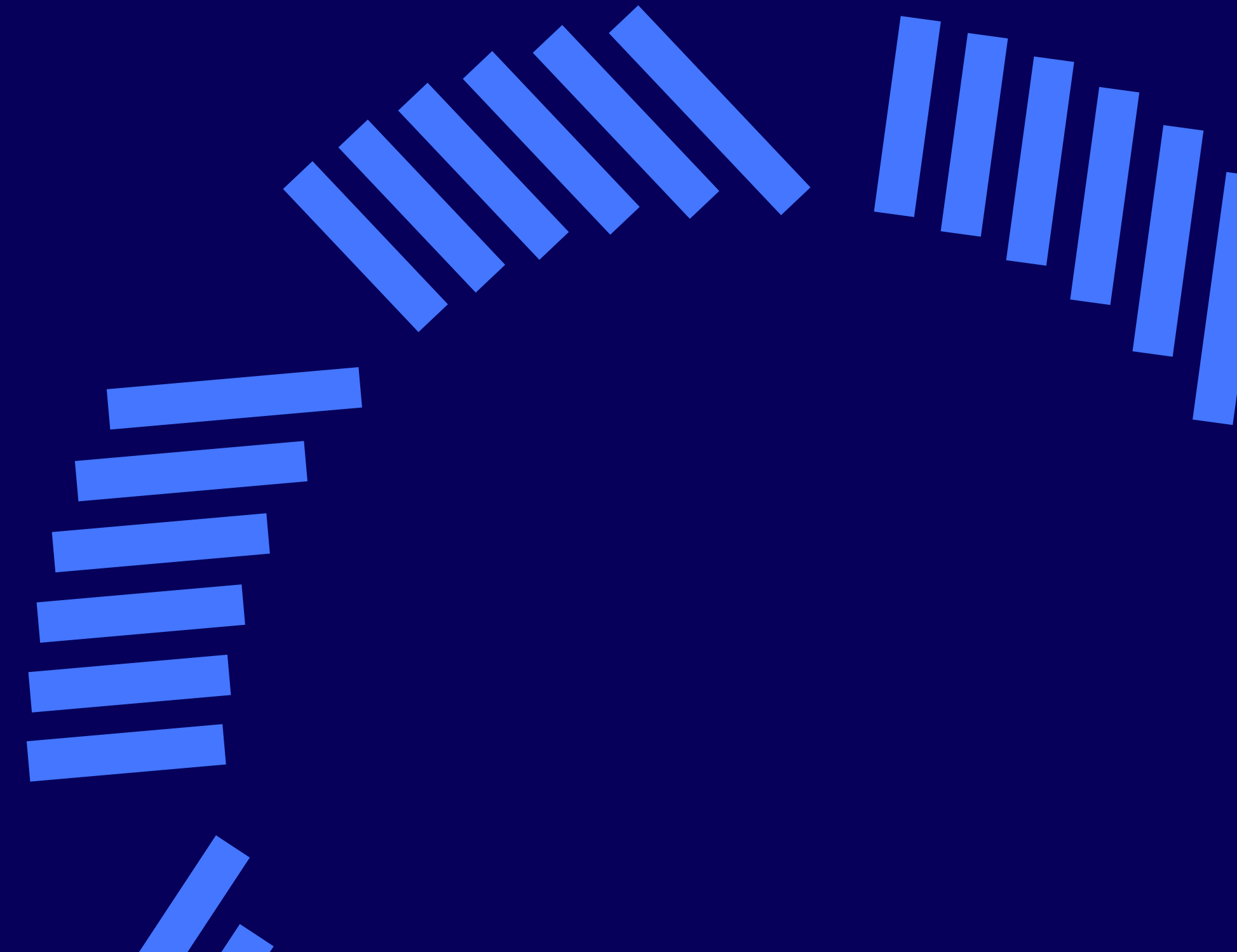
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