

2024

# Newsletter

JANUARY - JUNE



Türkiye Azerbaijan Georgia



The left side of the page features a decorative pattern of blue circular icons. Each icon is composed of multiple thin, parallel lines arranged in a circular or radial pattern, creating a textured, geometric effect. The icons vary slightly in their internal line arrangements, some forming a solid ring, others a star-like shape, and some with gaps. They are arranged in a grid-like fashion, with some icons partially cut off by the edges of the page.

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# Review of Past 6 Months

Over the past six months, our efforts have worked on engagement and outreach activities, emphasizing the value of CFA Charterholders and CFA Program candidates. We participated in 15 employer and 8 regulator outreach meetings, presented 4 job opportunities, and promoted key programs such as the Certificate in ESG Investing and Investment Foundations.

We announced the integration of CFA Program Level 1 Portfolio Management content into the Capital Markets Licensing Registry and Training Agency (SPL) renewal trainings. Our sincere thanks to the 17-member volunteer group, including Board members, who meticulously proofread the content, and to the three volunteers who transformed key texts into engaging video-content for the renewal trainings.

We adapted CFA Institute's "Gen Z and Investing: Social Media, Crypto, FOMO, and Family» Research Report Adaptation" to Türkiye as "Understanding the Investment Habits of Generation Z in Türkiye". The purpose of this research was to determine the investment goals, information sources, and general investment tendencies of the younger generation and to obtain important insights that will shed light on future investment strategies by understanding how young investors in Türkiye are affected by global trends and changing conditions. We collaborated with TKYD in this research.

In the 16<sup>th</sup> CFA Institute Local Research Challenge, the subject company was CCI, with Is Asset Management serving as the main sponsor. The winning teams were Koç University and Middle East Technical University (alphabetically). We had 11 university outreach meetings to inform students about the CFA Program, Research Challenge, and Certificate in ESG Investing. Continuing our tradition, the CFA Society Istanbul Board supported students who received scholarships and passed the Level 1 exam by providing them with an additional scholarship.

Recognizing the needs of academicians and exploring collaborations to enhance student career prospects remained crucial objectives for us. We organized a luncheon for academicians in İzmir.

We organized 17 webinars and events and actively participated in conferences and summits. These included an online experience-sharing session for our candidates, the Charter Award Ceremony, and the 10<sup>th</sup> Women in Finance Panel. 4 of the webinars was part of our PL-Credited seminar series. During the ceremony in Istanbul, we congratulated individuals who achieved their CFA Charters this year and celebrated those who completed the Certificate in ESG Investing. We completed our L1 and L2 prep courses spread over 5 weekends in February and March.

We were featured live on BloombergHT for the Research Challenge, with our Vice President and Research Challenge Committee Lead Sercan Uzun, CFA, alongside students from the winning team. Additionally, we published two articles in Bloomberg Businessweek Türkiye.

As we reflect on these past months, we are profoundly grateful for the unwavering engagement and support we have received from our members.

# 2023-2024 Leadership

## PRESIDENT

Alper Alkan, CFA

## VICE PRESIDENT

Sercan Uzun, CFA

## SECRETARY

Püren Kolabaş, CFA

## TREASURER

Gönenç Altınoklar, CFA

## BOARD OF DIRECTORS

Alper Alkan, CFA

Sercan Uzun, CFA

Püren Kolabaş, CFA

M. Sinan Veziroğlu

Gönenç Altınoklar, CFA

Gürkan Kızılkaya, CFA

Eyüp Işık, CFA

## MANAGING DIRECTOR

İlke Takımoğlu Homriş, CFA

## STAFF

Serra Akçay

## PAST PRESIDENTS

Alper Alkan, CFA 2022-2023

Oğuz Ayhan, CFA 2021-2022

Onursal Yazar, CFA 2020-2021

Albert Krespin 2016-2020

Ertunç Tümen, CFA 2013-2016

Eralp Denктаş, CFA 2012-2013

Onursal Yazar, CFA 2010-2012

Ismail Erdem, CFA 2008-2010

S.Alp Keler, CFA 2006-2008

Attila K. Koksall, CFA 2005-2006

Murat O. Kayahanlı, CFA 2002-2005

## COMMITTEES

### Awareness Committee

**Lead: M. Sinan Veziroğlu**

This committee oversees public communications including advertising, media communications, outreach etc., develops and maintains listing of local media contacts, develops and maintains website entries, issues press releases, feeds, maintains and develops social media sites (LinkedIn, etc.).

### Blockchain Committee

**Lead: Evren Cantürk**

This committee aims to position CFA Society Istanbul at the forefront of blockchain technology in finance, by providing education, fostering innovation, and facilitating networking and regulatory collaboration. The committee follows blockchain trends for finance, shares insights via webinars, reports, creates partnerships with stakeholders, plans events, and provides learning opportunities.

### Education & Scholarships Committee

**Lead: Gönenç Altınoklar, CFA**

This committee counsels both current and prospective candidates about CFA Program Review Courses, organizes CFA exam prep review courses, administers practice exam providers, including maintain contact with mock exam providers, administers the Society's Scholarship Program, administers CFA Institute Society Scholarships.

### Employer Outreach & Career Committee

**Lead: İlke Homriş, CFA**

This committee develops programs and services to enhance members' professional skills, provides tools and resources for members looking for jobs in the financial community, organizes career development events and reviews all policy issues relating to career support.

### ESG Committee

**Lead: Püren Kolabaş, CFA**

This committee provides all ESG related trends, research, documents and news, organizes and promotes webinars and trainings, communicates CFA Institute's research reports, consultation papers, surveys, articles, events and webinars to the members, regulatory and governance institutions and companies, attend ESG related events and provides speakers.

### Governance, Advocacy, Disciplinary Committee

**Lead: Alper Alkan, CFA**

This committee co-ordinates local advocacy efforts, liaises with CFA Institute, advocates for integrity in the local markets through research, guidance, and publication, works with, and provides a resource for, the Disciplinary Committee where appropriate, organizes and maintain AGMs of the Society, Monitors and evaluates progress of the Strategic Plan, determines Action Plans and maintains Action Plans of the 2-year-term for Directors and Officers.

### Membership & Volunteering Committee

Lead: **Gürkan Kızılkaya, CFA**

This committee approves membership applications along with the Board, ensures that member data is used for appropriate purposes only, reviews all policy issues relating to membership, communicates with members and makes surveys to determine their needs. This committee also assists the Program Committee for activities planned for members. Also, the committee maintains society website and other IT solutions in coordination with committee heads, evaluates technical solutions, manages Society Domain Name and Web Hosting Relationship, website & publishing also outsourced by the social media agent.

### Program and Sponsorship Committee

Lead: **Sercan Uzun, CFA**

This committee counsels both current and prospective candidates about CFA Program or any other product/program by CFA Institute, assists Member Value Committee with Charter Award Ceremony, Markets to the local financial industry the CFA Program any other product/program by CFA Institute, organizes regular events include: charter award ceremony and the Annual General Meeting (AGM).

### Research Challenge Committee

Lead: **Sercan Uzun, CFA**

This committee encourages and organizes university participation among the natural territory of the society (Turkey, Azerbaijan, Georgia) in the Research Challenge, get sponsorship, determines the subject company, follow local, regional and global Challenge timeline, submits registration forms, assigns judges and graders, prepares and edits all the communication including social media posts, press articles, newsletter articles, congratulations messages, feedback reports, gifts, virtual or in-person venue.

### University Relation Committee

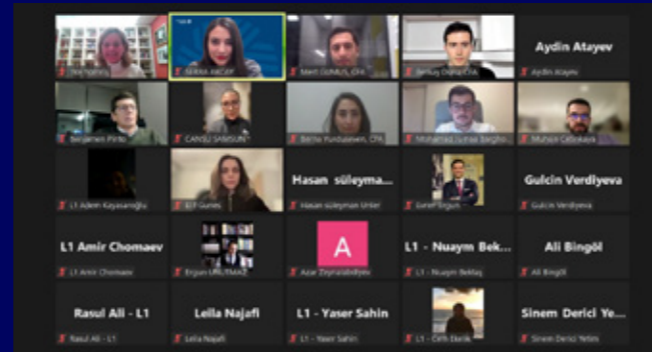
Lead: **Eyüp Işık, CFA**

This committee develops effective interaction with local Universities, develops and maintains the CFA curriculum inclusion into the Bachelor and Master Program in Finance, facilitates networking opportunities between Society members, CFA program candidates, students from local universities and professionals, encourages university participation in the Global Research Investment Challenge.

# Webinars & Events

16 January

## Online CFA Program Experience-Sharing Meeting



19 February

## Live on BloombergHT for Research Challenge with our Vice President and Research Challenge Committee Lead Sercan Uzun, CFA, and students from winning teams



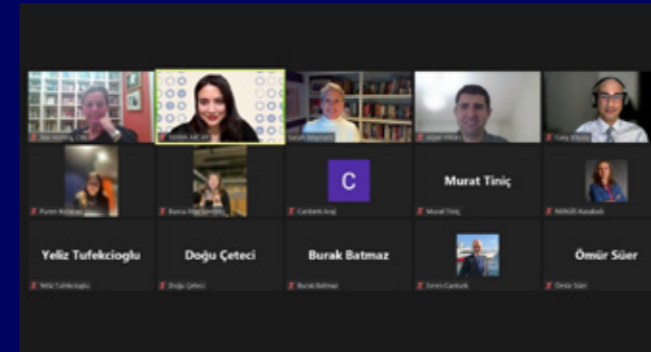
26 March

Iftar



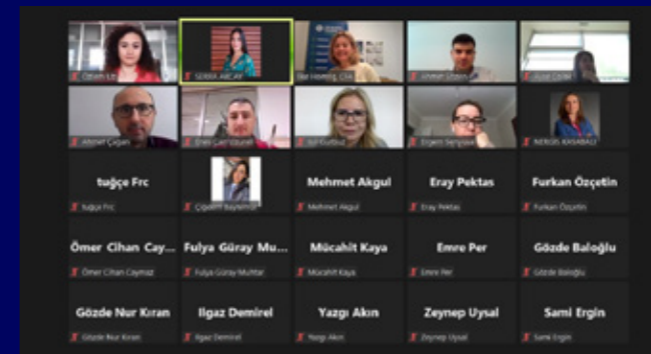
23 January

## Online Introductory Meeting for members with CFA Institute for DEI Code



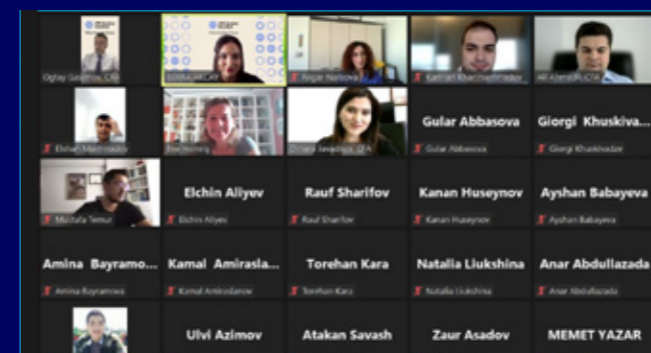
20 February

## Online Meeting for members with Public Oversight, Accounting and Auditing Standards Authority on the recently published Sustainability Reporting Standards



2 April

## Online CFA Program Experience-Sharing Session with Azerbaijan Members



# Webinars & Events

7 May

**Climate Investment Conference**  
co-organized by CFA Society  
Istanbul and SustainFinance



21 May

**CFA Institute Society Leader Call**



9 May

**10<sup>th</sup> CEE Conference in Romania**



9 May

**10<sup>th</sup> CEE Conference in Romania**



Our managing director İlke Homriş, CFA, co-moderated the CEE macroeconomics panel along with Adrian Codirlasu, CFA, Vice President of CFA Society Romania

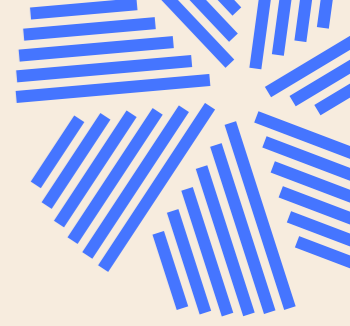
6 February

**Our President Alper Alkan, CFA,**  
participated as a speaker in  
**Azerbaijan Honours Academy CFA**  
**Program Online Introduction Session**

# Research on Gen Z and Investment Priorities in Türkiye

We adapted CFA Institute's "Gen Z and Investing: Social Media, Crypto, FOMO, and Family" Research Report to Türkiye as "Understanding the Investment Habits of Generation Z in Türkiye". We collaborated with TKYD in this research. The purpose of this research is to determine the investment goals, information sources, and general investment tendencies of the younger generation and to obtain important insights that will shed light on future investment strategies by understanding how young investors in Türkiye are affected by global trends and changing conditions. The report will be released soon.





# CFA Institute PL-Credited Hybrid Seminars

There are many members who preferred to join online to these seminars.

**17 January**  
**Hybrid, 2 PL-Credited, Inflation Accounting Seminar**



**15 February**  
**Hybrid, 2 PL-Credited, Behavioral Asset Pricing Seminar**



**25 March**  
**Hybrid, 2 PL-Credited, Mastering Futures for Strategic Hedging and Speculation: Practical Insights from Borsa Istanbul VIOP Seminar**



**29 April**  
**Hybrid, 2 PL-Credited, Behavioral Corporate Finance Seminar**



# Regulator Outreach

**4 January - 9 January - 9 February**  
Online meeting with Baku Stock Exchange & CFA Institute & CFA Society Istanbul

**25 January**  
Online Public Oversight, Accounting and Auditing Standards Authority, Regulator Outreach Meeting

**4 March**  
In-person MoU Signing Ceremony with Baku Stock Exchange

**2 May**  
Turkish Court of Accounts



**13 May**  
SPL MoU Signing

**21 May**  
CFA Program L1 Portfolio Management Content Integration to the SPL Renewal Trainings - Member Proofreading Group



# Employer Outreach



**11 January**  
Is Asset Management, Employer Outreach Meeting

**25 February**  
Maxis Venture Capital Asset Management, Online Employer Outreach Meeting for the ESG Investing Certificate

**5 March**  
Is Investment & CFA Society Istanbul & Baku Stock Exchange, Employer Outreach Meeting

**5 March**  
Ak Asset Management & CFA Society Istanbul & Baku Stock Exchange, Employer Outreach Meeting

**18 March**  
Renault, Employer Outreach Meeting

**4 April**  
Denizbank, Employer Outreach Meeting

**22 April**  
Peryön, Employer Outreach Meeting

**13 May - 4 June**  
EnerjiSA

**8 February**  
Denizbank, Employer Outreach Meeting

**5 March**  
Ak Investment & CFA Society Istanbul & Baku Stock Exchange, Employer Outreach Meeting

**5 March**  
İş Asset Management & CFA Society Istanbul & Baku Stock Exchange, Employer Outreach Meeting

**6 March**  
Ak Asset Management & CFA Society Istanbul & Baku Stock Exchange, Employer Outreach Meeting

**1 April**  
Eczacıbaşı Holding

**16 April**  
Peryön, Employer Outreach Meeting

**13 May**  
Akbank

**10 June**  
JCR Eurasia Rating

# University Outreach

**6 February**  
CFA Institute & Bogazici University, CFA Society Istanbul, University Outreach Meeting

**6 March**  
Istanbul University, In-person University Outreach Meeting



**18 April**  
Blockchain University Clubs Meeting, University Outreach Meeting



**29 April**  
İstanbul Ticaret Üniversitesi, University Outreach Meeting



**21 February**  
Bogazici University Business Administration Club, University Outreach Meeting

**21 March**  
Bahcesehir University, In-person University Outreach Meeting



**25 April**  
Academics Luncheon in İzmir, University Outreach Meeting



**2 May**  
Middle East Technical University, University Outreach Meeting



# CFA Institute Research Challenge Local Final

16 May

University Conference in Poland,  
University Outreach Meeting



23 May

Yeditepe University Career Day,  
University Outreach Meeting



24 May

Eskişehir Anadolu University



16 February

Research Challenge Local Final

We held the 16<sup>th</sup> CFA Institute Local Research Challenge. Reports for CCI have been graded by CFA Charterholders. Congratulations to the winner teams! The teams that made it to the Sub-Regional Final are as follows alphabetically: Koç University, Middle East Technical University (ODTÜ - METU).

We thank CCI for their support throughout the journey of being the subject company, and our main sponsor and continued supporter, İş Asset Management for all their contributions and internship opportunities. We also thank our judges, Emrah Yücel from Rota Asset Management, Mehmet Gerz from Ata Asset Management, Oğuz Ayhan, CFA, from İş Asset Management, Seda Karşıt Tiryaki, CFA, Bank of America Merrill Lynch.

This year, 25 universities and 31 teams from Türkiye (Ankara, Eskisehir, Istanbul, Izmir), Azerbaijan, Georgia and Uzbekistan participated in the challenge.



# University Affiliation Program

## APPLY TO THE UNIVERSITY AFFILIATION PROGRAM

Academic institutions that embed a significant portion of the CFA Program Candidate Body of Knowledge (CBOK)—including the Code of Ethics and Standards of Professional Conduct—into their curriculum may be eligible to participate in the University Affiliation Program. An Affiliated University signals to their students and to employers that their curriculum is closely tied to the practice of investment management and is helpful to students preparing for the CFA® Program exams.

To request an application\* and find out more, please email us at [university@cfainstitute.org](mailto:university@cfainstitute.org). \*Applications for the University Affiliation Program are considered on a case-by-case basis; meeting eligibility requirements does not guarantee acceptance into the program.

# 18 CFA Program Affiliated Universities

Bilgi University, Bilkent University, Bogaziçi University, Dokuz Eylül University, Galatasaray University, Istanbul Commerce University, Istanbul University, Izmir University of Economics, Kadir Has University, Koç University, ODTÜ, Piri Reis University, Sabancı University, TED University, TOBB ETÜ University of Economics & Technology, UNEC Azerbaijan State University of Economics, Yeditepe University, Yıldız Technical University.



We, as CFA Society Istanbul Board, continue to support our students with an additional scholarship. The scholarships will be offered to the following students:

- 1- The student must be studying at a CFA Program Affiliated university in Türkiye.
- 2- The student must be awarded the CFA Institute Student Scholarship by their CFA Program Affiliated university.
- 3- The student must take the exam in Nov 2023 - Nov 2024 period and must PASS the exam.

The students who meet the above requirements, will be reimbursed by half of the remainder of the exam fee they had paid, when they share with us their L1 or L2 badge.

# Hybrid Review Courses for L1 & L2

We completed our L1 and L2 prep courses spread over 5 weekends in February and March.

## 24 February L1 & L2 Hybrid Review Courses



## 2 March L1 & L2 Hybrid Review Courses



## 9 March L1 & L2 Hybrid Review Courses



## 16 March L1 & L2 Hybrid Review Courses



## 23 March L1 & L2 Hybrid Review Courses



# 10<sup>th</sup> Women in Finance

7 March

## Women in Finance

We hosted a series of events for our 10th Women in Finance Panel. We began with a guided tour of the "Suppose You Are Not" exhibition, Ömer Koç Collection at Arter, followed by a reception. Our panel started with an opening speech by our Managing Director Ilke Homriş, CFA, and continued with Networking Expert Erdal Uzunoğlu who delved into the importance of building relationships. Our 10th Women in Finance panel, moderated by Ertunç Tümen, CFA, showcased insightful discussions from speakers legendary tennis player İpek Şenoglu, and legendary coach Giovanni Guidetti, offering valuable perspectives for personal and professional growth. A heartfelt thanks to Ertunç Tümen, one of our former presidents who initiated the idea of Women in Finance Panel at CFA Society Istanbul, and to AK Asset Management for their sponsorship.



# Charter Award Ceremony

21 May

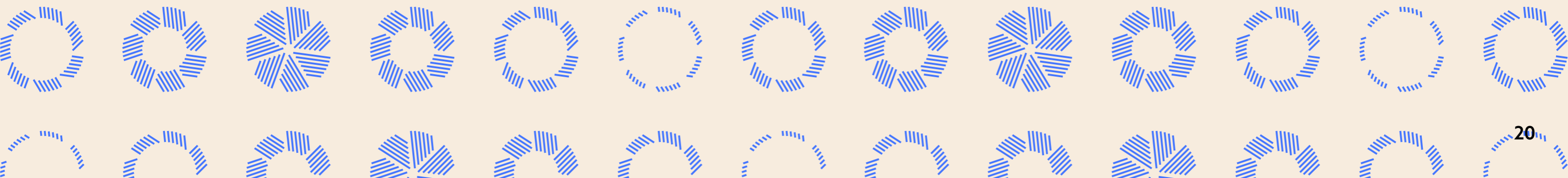
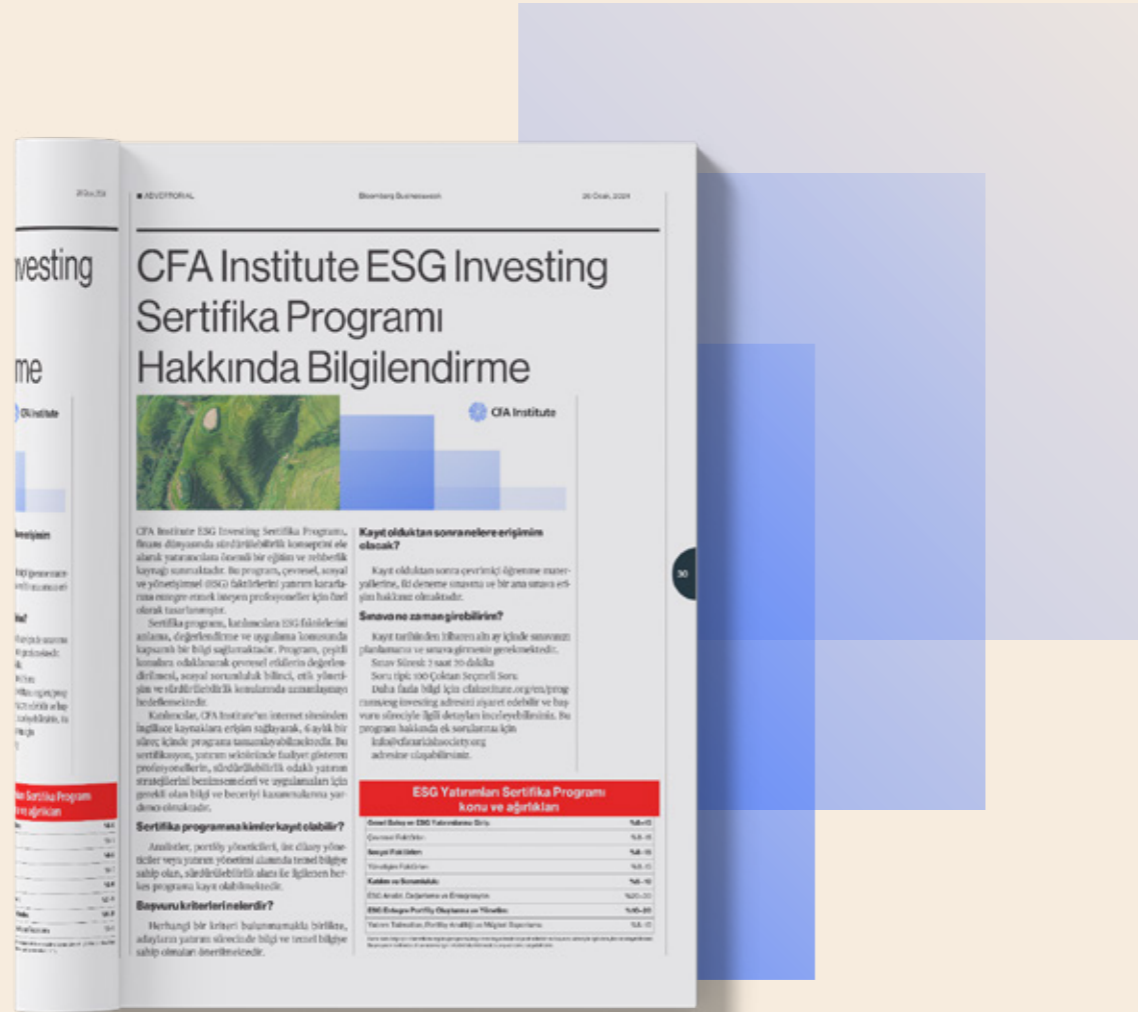
Celebrating success and commitment! Our Charter Award Ceremony & Networking event was an incredible celebration, welcoming new CFA Charterholders into our community. Congratulations to each of them for achieving this prestigious milestone! CEE PCR, Loukas Dedes was with us, we thank him for his participation. We also applauded the dedication of those who completed the Certificate in ESG Investing, showcasing their commitment to sustainability and responsible investing. We also congratulate our new charterholders who were not able to come to the ceremony.



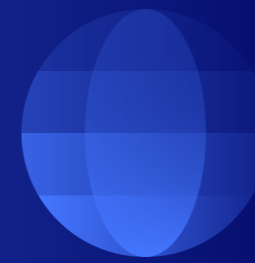
# Articles in Press



Our support for Bloomberg Business Week echoes our commitment in generating value for investment management professionals and engaging with the investment industry.



# Exam Road Map



**Level I**  
February 19-25, 2024

**Level I**  
May 15-21, 2024

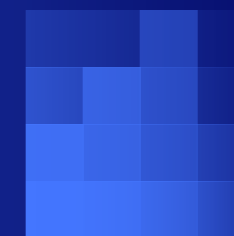
**Level I**  
August 20-26, 2024



**Level I**  
November 13-19,  
2024

**Level II**  
May 22-26, 2024

**Level II**  
August 27-31, 2024



**Level II**  
November 20-24,  
2024

**Level III**  
February 15-18,  
2024

**Level III**  
August 16-19, 2024

# Evolution OF THE CFA<sup>®</sup> PROGRAM

## THE CHARTERED FINANCIAL ANALYST (CFA<sup>®</sup>)

Program is designed to equip candidates with the knowledge and skills necessary to compete and excel in today's complex and evolving investment industry.

It is a self-study, three-level exam that tests the fundamentals of investment tools, company valuation, portfolio management, and wealth planning. Whether an individual is an aspiring or practicing investment professional, the CFA Program offers a way to move forward and achieve professional goals.

The curriculum is developed by CFA Institute, one of the world's leading associations of investment professionals. By enlisting the investment industry's brightest minds to continually improve the CFA Program, CFA Institute ensures that the curriculum is always relevant and provides real-world skills in investment analysis.

### Changes coming to the CFA Program for 2024

- Expanded Eligibility for University Students
- Streamlined Curriculum
- Hands-On Practical Skills Modules
- Specialized Pathways at Level III
- Optional Practice Packs for Level I
- Recognition of Success with Badges upon completion of each level



TO EXPLORE ALL CHANGES SCAN BELOW



## CFA PROGRAM AT A GLANCE

### COMPUTER-BASED TESTING

CFA Institute hosts computer-based exams in over 400 testing centers located in most major cities around the world.

### REGISTRATION PROCESS

Registering for the CFA exam is a two-step process

#### Step 1

Enroll in the CFA exam through the CFA Institute website

[www.cfainstitute.org/programs/cfa/register](http://www.cfainstitute.org/programs/cfa/register)

#### Step 2

After the registration process is complete and payment processed, candidates will be able to schedule their exam at available testing centers with dates and times.

### CFA PROGRAM COSTS\*

There is a one-time enrollment fee of USD 350 the first time a candidate registers for the Level I exam. An enrollment fee is not charged for subsequent exams. All fees must be paid in US dollars.

One-Time Enrollment Fee	USD 350
Early Registration	USD 940
Standard Registration	USD 1,250

\* Prices noted are for February 2024 window

### STUDY MATERIALS

CFA Institute provides candidates with access to a wealth of information that will help them to pass the CFA exams and excel in their career.

### STUDY TOOLS: LEARNING ECOSYSTEM

CFA Institute provides the full curriculum in a comprehensive digital Learning Ecosystem to all registered candidates. It includes study sessions for each level, custom study plans, practice questions and more.

### EXPANDED ELIGIBILITY

CFA Institute has extended CFA Program candidate eligibility by one year to include university students with two years remaining in their undergraduate studies.

### OPTIONAL PRACTICE PACK FOR LEVEL I CANDIDATES

A suite of additional prep materials for Level I, including extra practice questions and mock exams from the authors of the CFA Program. (available for purchase with Program enrollment and exam registration)

### SCHOLARSHIPS

As part of the CFA Institute commitment to promoting the highest standards of professional excellence, scholarships help make the CFA Program more accessible for people who want to advance in their careers.

### WHAT IS KEY TO EXAM SUCCESS?

#### 300+ HOURS

On average, candidates spend over 300 hours of study per exam level.

#### EXAM PREP

All exam questions are based on CFA Program curriculum.

#### STUDY TOOLS

Online Learning Ecosystem, Practice Questions, Mock Exams, Candidate Discussion Board, and Prep Courses.

#### 4+ YEARS

On average, it takes over four years to complete the full program.

For more information, [click here](#)

[REGISTER NOW](#)

# CFA CHARTER

Achieve the highest distinction in the investment management profession—the CFA designation.

## THE CHARTERED FINANCIAL ANALYST (CFA®)

Program helps you capitalize on your strengths, supercharging your education and work experience into a designation that will tell the world you have the skills necessary to compete and excel in today's complex and evolving investment industry. The CFA charter is the gold standard for the investment industry. Charterholders enjoy a mark of distinction throughout the world.

CFA Program provides the strongest foundation in advanced investment, analysis, and real-world portfolio management skills for a career advantage that you will use at all stages of your career. This globally recognized and respected credential is held by more than 190,000 professionals across 160 markets.



You can hire people with an MBA, but you don't necessarily know that one MBA is the same as another MBA, whereas if you hire investment professionals with a CFA [designation], you absolutely have confidence at the level of qualification."

—Jenny Johnson, Franklin Templeton, President and CEO

## THE VALUE OF THE CHARTER

**POWERFUL GLOBAL NETWORK** of top industry professionals

**STRONG FOUNDATION AND COMMITMENT** to ethics and professionalism

**REAL-WORLD SKILLS** for making complex investment decisions

**RECOGNIZED AND WELCOMED** by markets and employers globally

**UNMATCHED EXPERTISE** in both practical investment analysis and management skills

**ACCESS** to career-advancing tools and education

## TOP FIVE GLOBAL CHARTERHOLDER ROLES

### JOB TITLES

- 1) Portfolio Manager
- 2) Research Analyst
- 3) Chief Level Executive
- 4) Consultant
- 5) Risk Manager

### PRACTICE TYPES

- 1) Equities
- 2) Fixed Income
- 3) Private Wealth and Private Markets
- 4) Derivatives
- 5) Real Estate

# HOW TO EARN THE CFA CHARTER

## THE PATH TO BECOMING A CHARTERHOLDER

- Pass Three Levels of the CFA Exam
- Submit Reference Letters
- Achieve Qualified Work Experience
- Apply for CFA Institute Charterholder Membership

## EXAM SUCCESS INCLUDES

### 300+ HOURS

On average, candidates spend over 300 hours of study per exam level.

### EXAM PREP

All exam questions are based on CFA Program curriculum.

### STUDY TOOLS

Online Learning Ecosystem, Practice Questions, Mock Exams, Candidate Discussion Board, Optional Practice Pack, CFA Institute Learning Mobile App, and Approved Prep Provider List.

### 4+ YEARS

On average, it takes over four years to complete the full program.

## ENROLLMENT REQUIREMENTS

To enroll in CFA Program and register for the Level I CFA exam, you must have an international travel passport and meet one of the following entrance requirements:

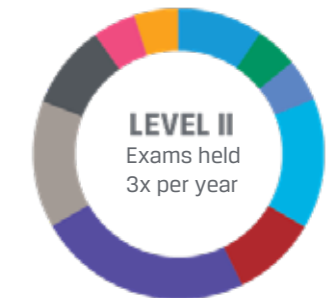
- **Bachelor's Degree** Complete a bachelor's program or equivalent program and received a university/college degree. If you're not sure if your program is comparable, ask your college or university.
- **Junior or Senior University Student** Be within 23 months from completing your undergraduate degree to begin your CFA Program journey.
- **Professional Work Experience** Have a combination of four years (or 48 months) of full-time work experience and/or college/university education on the date of enrolling for the Level I exam. Dates of education and professional work experience cannot be overlapping.

## READY TO TAKE THE NEXT STEP?

Visit [www.cfainstitute.org/programs/cfa](http://www.cfainstitute.org/programs/cfa) for more detailed information.

## COMPLETE THREE LEVELS OF THE CFA EXAM

Focus areas vary by exam level, increasing in complexity and difficulty with a core of ethics and professional standards across all levels.



### CURRICULUM TOPICS

- ETHICS AND PROFESSIONAL STANDARDS
- QUANTITATIVE METHODS
- ECONOMICS
- FINANCIAL REPORTING AND ANALYSIS
- CORPORATE FINANCE
- EQUITY INVESTMENTS
- FIXED INCOME
- DERIVATIVES
- ALTERNATIVE INVESTMENTS
- PORTFOLIO MANAGEMENT AND WEALTH PLANNING
- PRIVATE WEALTH
- PRIVATE MARKETS



# Expand Your ESG Investing Knowledge

Register for the 2024 Certificate in ESG Investing

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## Stay Relevant in a Rapidly Evolving Industry

In many ways, we are moving from sustainable investing as a good idea to a reality that has implications for all investment portfolios.

Being able to incorporate environmental, social, and governance (ESG) factors into investment decisions is becoming an increasingly important skill for anyone working in the investment industry.

The CFA Institute Certificate in ESG Investing can help you meet this growing demand.

By equipping 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.

## Who Should Enroll

This certificate is designed for investment practitioners who want to learn more about how to analyze and integrate material ESG factors into their day-to-day roles.

It is suitable for anyone working in front or back offices and adjacent roles — including sales and distribution, wealth management, product development, financial advice, consulting, risk — as well as anyone looking to improve their understanding of ESG issues.

No prerequisites but prior knowledge of the investment process is recommended.

## Content

The certificate and learning materials were developed by leading practitioners for practitioners and have received recognition from the UN Principles for Responsible Investment (PRI).

PRI is an independent body that seeks to encourage investors to use responsible investment to enhance returns and better manage business risks.

- ▶ Overview to ESG Investing and the ESG Market
- ▶ Environmental Factors
- ▶ Social Factors
- ▶ Governance Factors
- ▶ Engagement and Stewardship
- ▶ ESG Analysis, Valuation, and Integration
- ▶ ESG Integrated Portfolio Construction and Management
- ▶ Investment Mandates, Portfolio Analytics and Client Reporting

## What You'll Learn

**Upon completion of this certificate, you will gain knowledge in the following areas:**

- ▶ Context for different approaches to responsible investment and specifically, consideration of environmental, social and governance (ESG) factors.
- ▶ Underlying issues that constitute factors within each of the environmental, social and governance areas.
- ▶ Broader sustainability context and global initiatives.

- ▶ The ESG market: relevance, size, scope, key drivers and challenges, and risks and opportunities.
- ▶ Environmental factors, systemic relationships, material impacts, megatrends and approaches to environmental analysis at country, sector and company levels.
- ▶ Social factors, systemic relationships, material impacts and approaches to social analysis at country, sector and company levels.
- ▶ Governance factors, key characteristics, main models and material impacts.
- ▶ Engagement and stewardship.
- ▶ ESG analysis, valuation and integration.
- ▶ Ability to analyze how ESG factors may affect industry and company performance, and security valuation across a range of asset classes.
- ▶ ESG integrated portfolio construction and management.
- ▶ Application of various of approaches to ESG analysis and integration across a range of asset classes.
- ▶ Investment mandates, portfolio analytics and client reporting.

To learn more or register, scan the QR code below!

SCAN ME



# Explore Available Scholarships

CFA Institute's variety of scholarships allow more people to participate in the CFA Program. You can find the full list of scholarships below or take advantage of the scholarship assessment tool to find the scholarship best suited for you. All scholarships include a waived enrollment fee and discounted registration.



# Investment Foundations<sup>®</sup> Certificate



## Format

Self-paced online

## Level

Beginner

## Length to complete

60-90 hours

## Price

USD350 for the six courses and exam

## Recognition format

- Digital badge
- Certificate for passing the exam

## Participant profile

This series of courses is designed for those aspiring to, or currently working within, support roles across the investment and finance industries. It will benefit those in roles such as marketing, sales, project management, human resources, IT, and legal through better understanding of the industry, facilitating communication with colleagues, and advancing in one's career.

The goal of the Investment Foundations<sup>®</sup> Certificate is to provide an overview of the essentials of finance, ethics, and investment roles, providing a clear understanding of the global investment industry including terminology and foundational concepts. Individual learners develop competence by understanding industry functions, relationships, and their role and professional responsibilities, helping them see where they fit in the big picture. Successfully completing all 6 courses makes one eligible to sit for the final assessment which, when passed, confers an Investment Foundations Certificate and digital badge.

## Learning outcomes

- Confidently and skillfully communicate and collaborate with investment management practitioners
- Develop critical thinking skills, ask the right questions, and innovate in optimizing financial outcomes for clients
- On-ramp to the investment profession as a CFA Institute Investment Foundations Certificate holder
- Learn ethical reasoning, understand job roles and responsibilities, and grasp the concepts, tools, and techniques used in the industry



### ACCESS SCHOLARSHIP

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 USD300.



### PROFESSOR SCHOLARSHIP

For full-time college/university professors or administrators/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 USD400.



### WOMEN'S SCHOLARSHIP

For women who are interested in earning the CFA charter, do not qualify for other CFA Institute scholarships, and have not yet registered for their next exam. Exam registration reduced to USD400.



### REGULATOR SCHOLARSHIP

For employees of financial regulators, central banks, securities commissions, qualifying stock exchanges, SROs and/or government entities. Specifically, those entities that oversee or regulate operations, standards of practice or business conduct of the investment management industry and which have entered into a program agreement with CFA Institute. Exam registration reduced to USD400.



### STUDENT SCHOLARSHIP

For students currently attending an affiliated university and have not yet registered for their next exam. Exam registration reduced to USD400.

Session topics	
Course 1	Industry Overview and Structure
Course 2	Types and Functioning of Markets
Course 3	Investment Instruments
Course 4	Investment Inputs and Tools
Course 5	Serving Client Needs
Course 6	Serving the Greater Good

# Contact Information And Social Media

General Issues: [info@cfaturkishsociety.org](mailto:info@cfaturkishsociety.org)

Membership: [membership@cfaturkishsociety.org](mailto:membership@cfaturkishsociety.org)

Events: [program@cfaturkishsociety.org](mailto:program@cfaturkishsociety.org)


Education: [candidateprep@cfaturkishsociety.org](mailto:candidateprep@cfaturkishsociety.org)

Research Challenge: [researchchallenge@cfaturkishsociety.org](mailto:researchchallenge@cfaturkishsociety.org)

 [www.cfasociety.org/istanbul](http://www.cfasociety.org/istanbul)

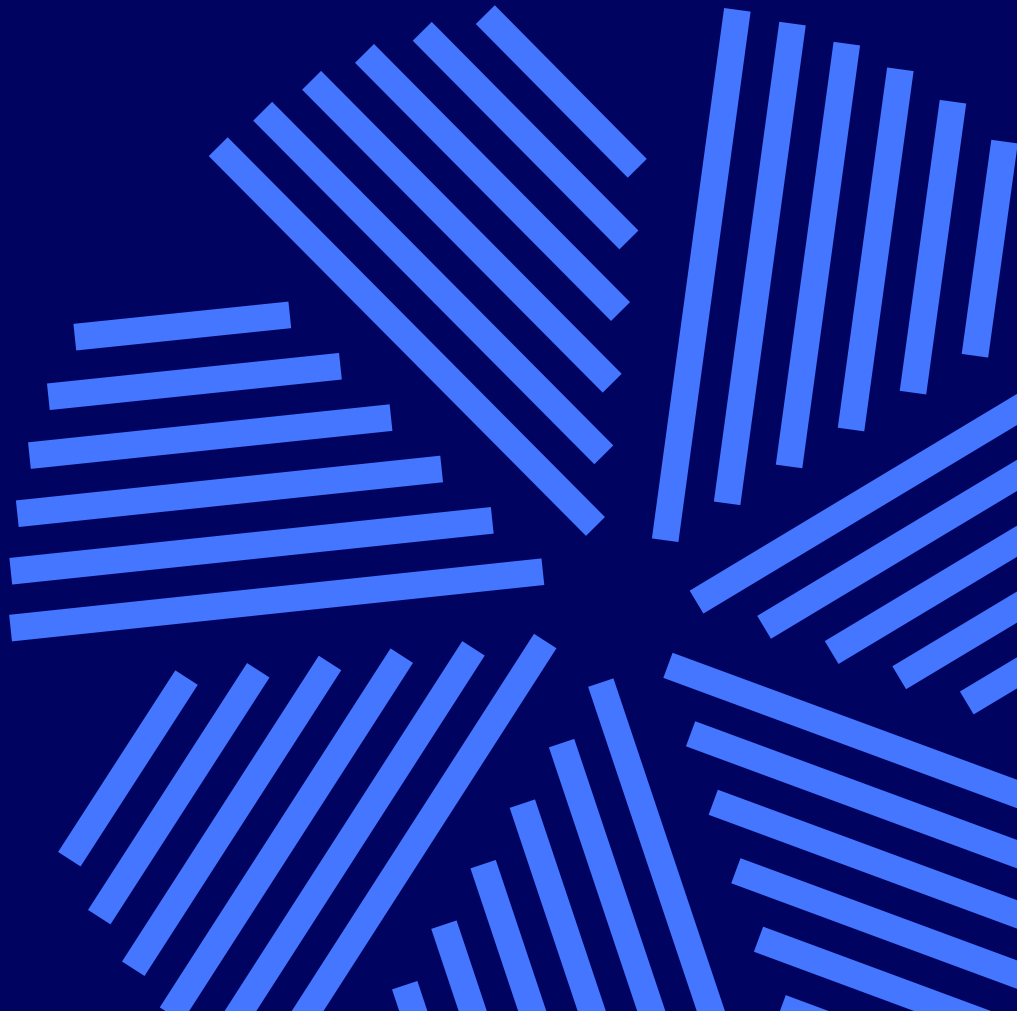
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