

2022-23 CFA INSTITUTE RESEARCH CHALLENGE

Is YOUR University Up to the Challenge? CFA Society St Louis hosts the local feeder event for Eastern Missouri.

What? The annual CFA Institute Research Challenge is a global competition that provides university students with hands-on mentoring and intensive training in financial analysis. Students work in teams to research and analyze a publicly-traded company, and then write a research report on their assigned company with a buy, sell, or hold recommendation.

Why? The Contest gathers students, investment industry professionals, publicly traded companies, and corporate sponsors together locally, regionally, and globally for a real-world competition. The Contest's goal is to promote best practices in equity research and company analysis. Students research, analyze, and report on a company as if they are practicing analysts. Additionally, all participants are introduced to and held to the standard of the CFA Institute Code of Ethics and Standards of Professional Conduct.

When? The contest begins in September. Mentors meet with the students several times between September and January. The local champion is determined in February and advances to regional competitions held in April.

How? Each CFA city host launches an Investment Research Challenge in conjunction with a participating university. The universities assemble teams of 5 business and finance students who work directly with a company in researching and preparing a company analysis. Mentors with equity analysis experience will be assigned to each team to help the students. Each team submits a research report on a specified company and later does a final presentation in front of a judge's panel consisting of high-profile CFA-STL members.

For more details, contact:

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