Postgraduate studies:
Analiza finansowa i inwestycje - koncentracja na CFA® poziom I

Financial Analysis and Investments: concentration on CFA® – level I

Tomasz Schabek
Faculty of Economics and Sociology
University of Lodz, Poland
tschabek@uni.lodz.pl
Financial Analysis and Investments: concentration on CFA® – level I

Chartered Financial Analyst (CFA) designation is the most respected and recognized investment management designation in the world.

It is a certificate of quality in the financial investment world – most prestigious and most known financial institutions hire CFA charterholders professionals to deliver high quality work for their clients all over the world.

CFA® and (Chartered Financial Analyst®) are registered trademarks owned by CFA Institute. We identify CFA Institute as the administrator of the CFA Program, the CIPM Program, and the Investment Foundations™ Program; and identify CFA Institute as the grantor of the CFA and CIPM designations and the Investment Foundations Certificate. Studying in this specific program will not guarantee acceptance into or passage of any of CFA Institute’s programs. This program is not affiliated with, sponsored, or approved by CFA Institute.
Financial Analysis and Investments: concentration on CFA® – level I

• Valuable opportunity for students of finance and economics but not only!

• Top Employers of CFA Charterholders:

<table>
<thead>
<tr>
<th>Employer</th>
<th># of Charterholders</th>
</tr>
</thead>
<tbody>
<tr>
<td>JP Morgan Chase</td>
<td>1.780</td>
</tr>
<tr>
<td>UBS</td>
<td>1.463</td>
</tr>
<tr>
<td>RBC</td>
<td>1.451</td>
</tr>
<tr>
<td>Bank of America Merrill Lynch</td>
<td>1.451</td>
</tr>
<tr>
<td>Wells Fargo</td>
<td>1.255</td>
</tr>
<tr>
<td>HSBC</td>
<td>1.232</td>
</tr>
<tr>
<td>Credit Suisse</td>
<td>1.003</td>
</tr>
</tbody>
</table>

Source: CFA Institute
Financial Analysis and Investments concentration on CFA® – level I

- The plan of your carrier:
  - Investment fund?
  - Wealth management?
  - Investment banking?
  - Corporate finance?

... with CFA all those (and many more) possibilities are feasible ...

*Tomasz Schabek
University of Lodz Poland
tschabek@uni.lodz.pl*
Financial Analysis and Investments: concentration or CFA® – level I

• The curriculum is rich and prepares you for many different tasks in international investing environment.

• Our postgraduate studies prepare you for taking CFA exam by providing curriculum based on CFA Institute curriculum.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Level I</th>
<th>Level II</th>
<th>Level III</th>
</tr>
</thead>
<tbody>
<tr>
<td>ETHICAL AND PROFESSIONAL STANDARDS</td>
<td>15</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Quantitative Methods</td>
<td>12</td>
<td>5-10</td>
<td>0</td>
</tr>
<tr>
<td>Economics</td>
<td>10</td>
<td>5-10</td>
<td>0</td>
</tr>
<tr>
<td>Financial Reporting and Analysis</td>
<td>20</td>
<td>15-25</td>
<td>0</td>
</tr>
<tr>
<td>Corporate Finance</td>
<td>8</td>
<td>5-15</td>
<td>0</td>
</tr>
<tr>
<td>INVESTMENT TOOLS</td>
<td>50</td>
<td>30-60</td>
<td>0</td>
</tr>
<tr>
<td>Equity Investments</td>
<td>10</td>
<td>20-30</td>
<td>5-15</td>
</tr>
<tr>
<td>Fixed Income Investments</td>
<td>12</td>
<td>5-15</td>
<td>10-20</td>
</tr>
<tr>
<td>Derivatives</td>
<td>5</td>
<td>5-15</td>
<td>5-15</td>
</tr>
<tr>
<td>Alternative Investments</td>
<td>3</td>
<td>5-15</td>
<td>5-15</td>
</tr>
<tr>
<td>ASSET VALUATION</td>
<td>30</td>
<td>35-75</td>
<td>25-65</td>
</tr>
<tr>
<td>PORTFOLIO MANAGEMENT AND WEALTH PLANNING</td>
<td>5</td>
<td>5-15</td>
<td>45-55</td>
</tr>
</tbody>
</table>

Source: CFA Institute, The Economist
Financial Analysis and Investments: concentration on CFA® – level I

• According to The Economist CFA Charter is „The gold standard”

• The demand and popularity of the CFA charter is growing constantly, even if passing is quite challenging.
Financial Analysis and Investments: concentration on CFA® – level I

On the right you can find the part of the employment Finance & Accounting Salary Survey 2016 report prepared by goldmanrecruitment.pl

In the moment of acquiring the CFA average salary is equal to 8 300 PLN and after receiving the charter it is 16 400 PLN

Financial Analysis and Investments: concentration on CFA® – level I

Preliminary schedule of the courses: starting in mid-January and finishing in mid-May, just before the CFA Institute exam (in mid June). Classes are only on Saturdays and Sundays.

Recruitment for our studies: from 1st of May till 30th of November each year.
Details of our offer

• Our studies and all courses are in English - because of the language of the curriculum and CFA exam itself

• Study by subject and level - to offer courses of specific subjects of the CFA curriculum, adapted exactly for the purpose of examination

• Focus on the exam - time pressure, quick thinking, implementation concepts, tests, useful exam’s and test’s tips

• International context of the study - as in the CFA curriculum

• You receive official diploma of the Univeristy of Lodz after successful finishing of the studies

• Investment (course price): 3500 PLN for students from European Union (EU) and 3000 eur for students out of EU.

Tomasz Schabek
University of Lodz Poland
tschabek@uni.lodz.pl
CFA project at University of Lodz Chartered Financial Analyst

Contact:
Dr Agata Gniadkowska: agata.gniadkowska@uni.lodz.pl (+48 600 249 397)
Dr Monika Bolek: mbolek@ki.uni.lodz.pl
Dr Tomasz Schabek (Director): tomasz.schabek@uni.lodz.pl
In China:
Miss Katarzyna Chojnacka: katarzyna.chojnacka@uni.lodz.pl
Our site: http://kurscfa.uni.lodz.pl

About CFA: CFA Institute web-page: https://www.cfainstitute.org