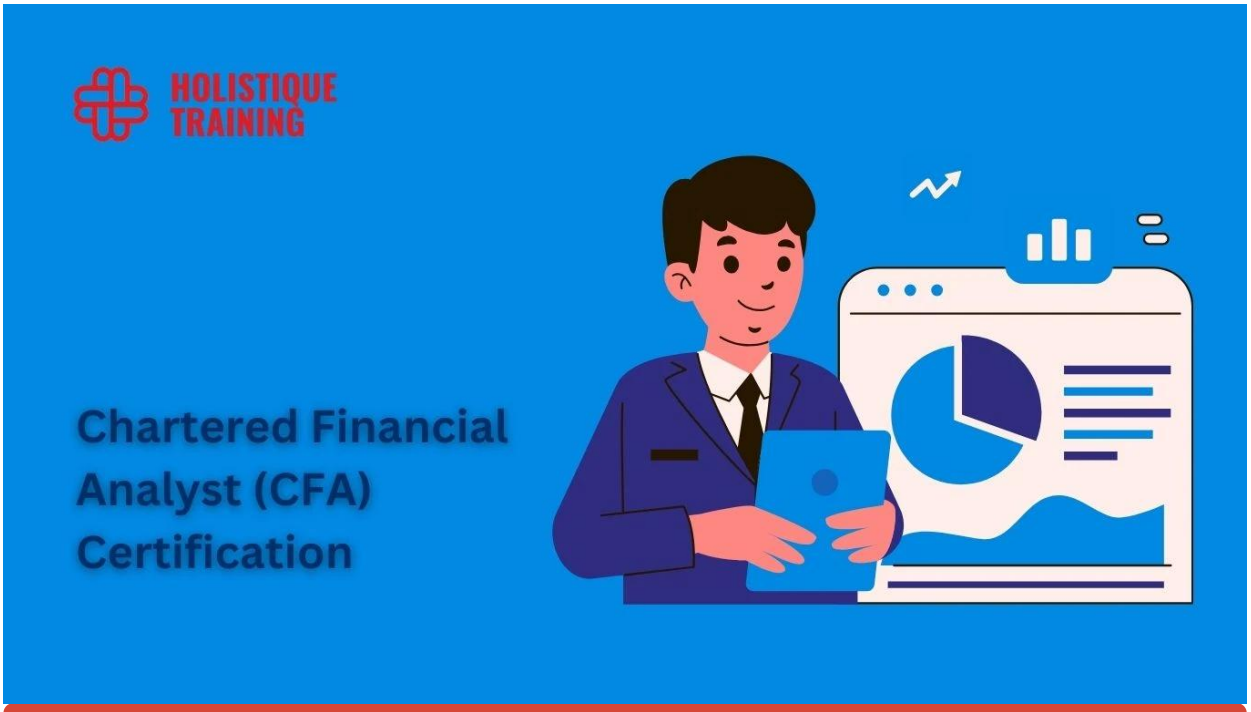


Chartered Financial Analyst (CFA) Certification

Duration: 5 Days

Language: en

Course Code: PF1-160

Objective

Upon completion of this course, participants will be able to:

- Provide a thorough understanding of the CFA curriculum and core financial principles.
- Equip participants with the skills to analyse and value different types of assets.
- Enhance knowledge in financial reporting, quantitative methods, and portfolio management.
- Prepare participants for success in the CFA exams across all three levels.
- Foster a commitment to ethical and professional standards in finance.

Audience

This course is intended for finance professionals and aspiring analysts who wish to deepen their understanding of financial analysis and investment management. It is ideally suited for:

- Financial analysts and investment analysts
- Portfolio managers and asset managers
- Corporate finance professionals and risk managers
- Graduates seeking a career in finance or investment management
- Professionals preparing for the CFA certification exams

Training Methodology

The CFA Certification training course employs a blended learning approach, combining structured lectures, interactive sessions, and self-paced study. Participants will engage with real-world financial data and case studies, allowing them to apply CFA concepts to practical investment scenarios. The course includes group discussions, problem-solving exercises, and simulated exam questions designed to reinforce theoretical knowledge and build practical analytical skills.

Each section of the course includes quizzes and practice exams, which help participants assess their understanding and track their progress. Mock exams simulate the actual CFA test environment, providing participants with the experience to manage time effectively and confidently approach exam questions. Course materials include study guides, reading lists, and access to digital resources to support ongoing learning and exam preparation.

The course encourages continuous review of key topics, fostering a deeper understanding of financial analysis and portfolio management. Instructors provide feedback on practice assessments, helping participants refine their approaches to complex questions.

Summary

The Chartered Financial Analyst (CFA) Certification training course is a comprehensive programme designed to prepare finance professionals for the prestigious CFA credential, a globally recognised qualification in investment management and financial analysis. The CFA designation is highly respected in the financial industry and reflects a rigorous standard of knowledge in areas such as portfolio management, financial reporting, and ethics. This course covers the essential concepts, theories, and tools that candidates need to master for

each CFA exam level.

This CFA course is structured around the CFA Institute's curriculum, focusing on the core topics required across the three levels of the exam: Level I (fundamentals of investment tools), Level II (application of investment tools and concepts), and Level III (portfolio management and wealth planning). Participants will gain in-depth knowledge of asset valuation, quantitative analysis, financial reporting, corporate finance, and ethics—key areas tested at each level.

Through engaging lectures, case studies, and practice exams, the course provides the foundational skills necessary to pass the CFA exams while enhancing participants' abilities to make data-driven investment decisions. In addition, participants will develop a deeper understanding of ethical and professional standards, equipping them to contribute meaningfully to the investment management industry.

Whether you are an aspiring investment analyst, portfolio manager, or finance professional seeking to advance your career, this course offers a pathway to success in the competitive finance sector. By achieving the CFA certification, participants will distinguish themselves as knowledgeable, ethical, and committed professionals.

Course Content & Outline

Section 1: Introduction to the CFA Programme

- Overview of the CFA certification and its significance in finance
- Exam structure and requirements for Levels I, II, and III
- Introduction to the CFA Institute Code of Ethics and Standards of Professional Conduct

Section 2: Investment Tools and Quantitative Analysis

- Fundamental quantitative methods and financial mathematics
- Statistical tools and probability theories in finance
- Time value of money and discounting techniques
- Basics of hypothesis testing and data analysis

Section 3: Economics and Financial Reporting

- Microeconomic and macroeconomic principles for financial analysts
- Financial statement analysis and reporting standards
- Ratio analysis, forecasting, and budgeting
- Understanding International Financial Reporting Standards (IFRS) and GAAP

Section 4: Corporate Finance and Equity Investments

- Corporate finance principles and investment decisions
- Capital structure, leverage, and dividend policy
- Valuation of stocks, bonds, and other equity instruments
- Market efficiency and equity analysis

Section 5: Fixed Income and Derivatives

- Fundamentals of fixed-income securities and markets
- Analysis of bond pricing, yields, and duration
- Introduction to derivatives, including options, futures, and swaps
- Risk management strategies using derivative instruments

Section 6: Portfolio Management and Wealth Planning

- Portfolio management theories and modern portfolio construction
- Asset allocation and risk management techniques
- Investment policy statements and client objectives
- Techniques for wealth management and tax-efficient investing

Section 7: Ethics and Professional Standards

- Understanding the CFA Code of Ethics and Professional Conduct
- Application of ethical principles in investment management
- Case studies in ethics and handling conflicts of interest
- Preparing for the ethical component of the CFA exam

Certificate Description

Upon successful completion of this training course, delegates will be awarded a Holistique Training Certificate of Completion. For those who attend and complete the online training course, a Holistique Training e-Certificate will be provided.

Holistique Training Certificates are accredited by the British Assessment Council (BAC) and The CPD Certification Service (CPD), and are certified under ISO 9001, ISO 21001, and ISO 29993 standards.

CPD credits for this course are granted by our Certificates and will be reflected on the Holistique Training Certificate of Completion. In accordance with the standards of The CPD Certification Service, one CPD credit is awarded per hour of course attendance. A maximum

of 50 CPD credits can be claimed for any single course we currently offer.

Categories

Banking and Finance, Finance, Accounting & Budgeting

Tags

finance, financial analyist

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