

Hong Kong are assigned professional research analysts as mentors who will provide guidance on research process and advice on general skills in report writing, company visits and presentation. Judges of investment professionals are invited to review the written reports and evaluate the performance of each participating team.

HKSEFA Best Research Reports Competition

To promote awareness of fundamental written researches and recognizing excellent published researches, HKSEFA launched our inaugural HKSEFA Best Research Reports Competition in 2014. This initiative aligns with HKSEFA's mission to raise the standard of practice and uphold the ethical standard of the Hong Kong financial services industry, thus ultimately enhancing Hong Kong's stature as a global financial hub.

Investor Education Seminars

We have been in partnership with Securities and Futures Commission / Investor Education Centre of Hong Kong for 9 years, HKSEFA organizes Investor Education Seminars to keep the general public and individual investors abreast of the topical investment knowledge and risk management.

Charitable Events

We participate in various charity fund raising activities such as the yearly Oxfam Trailwalker. Over the years, we have raised over HK\$2.3M for Oxfam.

Career and Ethics Talks

We host and participate in career and ethics talks for university students and the general public. It provides students with a deeper understanding of what it takes to become a financial analyst, the latest trends in the industry and the career development in the investment management profession. It also helps individual investors and the general public understand and employ better risk management strategies.

The Hong Kong Society of Financial Analysts

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CFA® Program

The CFA® Program is a self-study, graduate-level program for investment professionals. The course of study is determined by the Candidate Body of Knowledge™ covering ten major topics including Ethical and Professional Standards, Quantitative Methods, Economics, Financial Reporting and Analysis, Corporate Finance, Equity Investments, Fixed Income, Derivatives, Alternative Investments, and Portfolio Management and Wealth Planning. Level I examination is offered twice a year in June and December, while Level II and Level III examinations are offered only once a year in June.

To earn the CFA charter, the candidate must pass three rigorous, six-hour examinations, meet the professional and ethical requirements, gain at least four years of acceptable professional work experience, and become a regular member of CFA Institute.

To become a CFA candidate, one must have a U.S. bachelor's (or equivalent) degree; or be in the final year of bachelor's degree program at the time of registration; or have four years of qualified, professional work experience; or have a combination of professional work and college experience that totals at least four years.

The CFA® Program focuses on the globally relevant knowledge required of an investment generalist, and emphasizes the highest ethical and professional standards. CFA charterholders work for a variety of employers including investment companies / mutual funds, investment banks, broker dealers, commercial retail / mortgage banks, hedge funds, funds of hedge funds, insurance companies, etc.

For further information of the CFA® Program, please visit www.cfainstitute.org



香港財經分析師學會

THE HONG KONG SOCIETY OF FINANCIAL ANALYSTS



WWW.HKSFA.ORG

About Us

Who we are

The Hong Kong Society of Financial Analysts (HKSFA, the Society) is a non-profit organization founded in 1992 by a group of CFA charterholders in Hong Kong. HKSFA currently has over 6,000 members and is one of the largest member societies of CFA Institute, which has more than 130,000 members in 151 countries. HKSFA is mostly run by member volunteers with the support of a team of professional staff.

What we stand for

HKSFA shares the mission of CFA Institute in raising professional and ethical standard of financial analysts and investment practitioners through our continuing education events and advocacy effort. In addition to promoting the CFA designation in Hong Kong, the Society aims to provide a forum for our members, CFA Institute, other investment practitioners and regulators.

HKSFA is a founding member of The Hong Kong Business Valuation Forum, aiming to raise the reporting standards of the asset management companies and improve the standards of practice in the business valuation industry. We have been a panel judge for the Best Annual Report Awards organized by the Hong Kong Management Association.

Services to Members

Continuing Education Programs

Each year, the Society organizes a variety of continuing education programs in the format of luncheon / evening event, seminar, conference and workshop. Guest speakers are invited to give presentations over a wide-range of topics including portfolio management, securities analysis, industry analysis, global investing, risk management as well as ethics and regulations.

As an approved program provider from CFA Institute and the Securities and Futures Commission in Hong Kong,

participants of our programs can earn CE credits for the former as well as Continuous Professional Training (CPT) hours for the latter.

Social Events and Monthly Happy-hour Gatherings

The Society organizes regular social functions for fun and networking opportunities such as the Annual Forecast cum Annual Dinner, wine tasting events, chocolate and coffee tasting workshops, squid fishing boat trips, Christmas party, etc. In addition, we host free of charge monthly happy-hour gathering for our members and CFA candidates.

Career Progression Support

The Society supports the career progression of our members. We organize seminars, workshops and themed happy-hour gatherings for members and non-members to share industry insights and discuss career development.

Free access to our JobLine

JobLine is a list of employment opportunities in the investment and finance industries posted by employers and headhunters. It is exclusively available for HKSFA members and can be accessed through the HKSFA website.

Library

Members are welcome to visit the Society Library which carries both concurrent and reference books on investment and finance topics as well as the CFA Program Curriculum. Members can borrow these books free of charge.

Employer Outreach Programs

To help employers better understand and recognize the value and benefits of the CFA designation, HKSFA and CFA Institute jointly host annual employer outreach luncheon. This event brings together senior management and HR directors from top financial and investment companies in Hong Kong and provides an opportunity to share our thoughts and exchange ideas among participants.

Member Communication

The HKSFA annual report contains full disclosure of information on the operations and financial status of the Society. Our E-mails also provide updates on the activities of HKSFA and its members. It includes information about educational programs, networking events, news, etc. Most of the HKSFA publications, our responses to consultation papers, reports and seminar materials are posted on the website for members' reference. The website also provides a platform for members, CFA candidates and other visitors to exchange information and comment on any finance and investment related issues.

Services to Community

Candidate Services

To assist CFA candidates with their studies of CFA examinations, HKSFA organizes study groups and information sessions. Each year HKSFA organizes the CFA Charter Award Ceremony to congratulate candidates who have successfully completed the challenge of passing all the three levels of CFA examinations.

Research Prize

We jointly organize the Hong Kong Asian Capital Markets Research Prize with CFA Institute. The research prize is designed to encourage academic research projects that will further improve the standard of practice in Asian investment communities and pay tribute to the outstanding research undertaken by university faculties in Hong Kong. The papers are of empirical or practical significance for the capital markets.

CFA Institute Research Challenge

This annual global contest is designed to promote best practices in equity research among the next generation of analysts. The Local Final of CFA Institute Research Challenge in Hong Kong is organized by HKSFA. Contestants from universities in