

9th May 2016

Enhancing Member Value, Building Brand Awareness

Dear Members,

It is both an honour and a privilege to take on the role as President of the HK SFA, Hong Kong's leading professional investment body. These first few months have been both challenging and inspiring, and have given me newfound appreciation for the leadership, wisdom and vision of my predecessors.

I wanted to take this opportunity to share some of my initial thoughts on creating a shared future for HK SFA, leveraging our three pillars of continuing education, advocacy and employer outreach to provide greater value and benefit – to both our members and the financial community as a whole.

This year, we are focusing on a number of widespread initiatives to support each of our three mission statements:

1. Raise professional and ethical standards of financial analysts

To recognise excellence and promote awareness of written research, we are expanding our Best Research Report Competition (BRRC), the first industry award organized by and awarded to investment professionals. This year's addition of new categories and enhanced judging criteria will help to further improve ethical standards and best practices in Hong Kong's financial services industry.

In an exciting development, we will be collaborating with HKEX to launch a new Portfolio Management Competition, a buy-side competition to complement the proven success of the BRRC.

Building on member feedback, we have upgraded our Fintech interest group into a Fintech Committee – and will soon be releasing HK SFA's first video series on the Fintech space. We are also maintaining our efforts in Continued Education to keep members up-to-date on the latest industry trends and developments.

2. Promote HK SFA's contributions and the benefits of the CFA designation to the local financial community

Since 2014, "CFA Control Room" – a Cantonese radio programme produced in collaboration with Metro Finance Digital and the Hong Kong Economic Journal, has been a major platform for public awareness. Reaching out to a broader audience, HK SFA introduced a new finance-themed television programme this year, jointly produced with TVB.

We are also working with the global CFA Institute (CFI) to launch a major brand campaign – sharing the value and benefits of the CFA designation with financial, commercial and professional organizations around the world. The CFI's recently published Global Trust Survey on investment advisors will serve as one of the initial building blocks of our branding efforts.

3. Provide career support and professional development opportunities for our members

In addition to our regular seminars, workshops and themed happy-hour gatherings, HKSFA will be launching a new career conference this year – aimed at providing practical, timely career advice and career development insights to our members. This event will complement our existing JobLine, a list of employment opportunities in the investment and finance industries provided exclusively for HKSFA members.

Keeping abreast of the times, we are also introducing several new interest groups in Women in Investment Management, Short Selling and Private Banking. Working to identify and encourage new industry talent, we have reformatted our CFA Institute Research Challenge for students – with the goal of recognizing and rewarding the best and brightest young up-and-comers.

In addition to all of these initiatives, we have also been working hard to introduce new events and activities – such as “A Conversation with Lord Mervyn King”, a highly successful event featuring the former Governor of the Bank of England. Other new efforts aimed at providing leadership training to volunteers - and updating HKSFA’s governance structure and operational efficiency - are also being implemented by our board members and staff office.

With so many activities, initiatives and events in the works, I look forward to a year full of challenges, opportunities and rewards for HKSFA and our members. As this year’s President, I am proud to carry on my predecessors’ efforts in improving our organization’s value for all of our members, further enhancing the recognition, reputation and real-world benefits of one of Hong Kong’s largest professional investment associations.

Sincerely,

Ashley Khoo, CFA, CPA
President, HKSFA