



BIG CHALLENGE. BIGGER OPPORTUNITY.

2019 CFA Institute Research Challenge

The CFA Institute Research Challenge is an annual global equity research competition that provides university students with hands-on mentoring and intensive training in financial analysis. Working in teams, students gain real-world experience as they assume the role of research analysts and are judged on their ability to value a stock, write a research report, and present their recommendations. Teams compete with peers from other schools to see who will become the local, regional, and global champions.

We are searching for professionals like you, from top firms like yours, to accept the challenge to volunteer as a judge, mentor, grader, or speaker. Your firm can also sponsor the Challenge, thus helping to shape the future talent of the profession while at the same time elevating your brand.

2018 PARTICIPATION

5,700+ Students

4,000+ Volunteers

1,100+ Universities

150+ CFA Societies

112 Local Challenges

85 Countries



HOW THE CHALLENGE WORKS

Local CFA® Societies work with universities to assemble teams of three to five undergraduate and/or graduate students. Teams research and analyze a designated publicly traded company; prepare a written report on that company that supports a buy, sell, or hold recommendation; receive advice and support from a faculty adviser and an industry mentor; and present and defend their findings to a panel of industry experts. Winners from the local competitions advance to regional competitions in the Americas, Asia, and Europe, culminating in a global final.

BENEFITS OF PARTICIPATION

- Advance the industry and help prepare the next generation of investment professionals
- Get great brand exposure and promotion of your company on a global stage
- Promote education, excellence, and best practices
- Give back to the industry and the local community
- Network with peers, local universities, and other industry leaders in the community
- Make connections with young talent who will soon be joining the workforce

FREQUENTLY ASKED QUESTIONS



In what ways can my firm and I get involved?

- Volunteer to judge presentations, mentor students, grade reports, be a panelist, or speak at the event
- Sponsor one of the 100+ local Challenges held around the world
- Sponsor Challenges at the regional or global level



When is the Challenge?

Locally hosted Challenges are held September-February of each year. Regional Finals are held March-April, followed by the Global Final in April. Visit your local CFA Society webpage to find out when the local Challenges are being held.

Go to cfainstitute.org/societies/directory to find your society.



Can I attend if I'm not an official participant?

You are welcome to attend the event to connect with potential candidates and build your recruitment pipeline. We encourage participation in some capacity, as the experience of and interaction with professionals like you is what makes the Research Challenge special.



Where can I get more information about sponsorship opportunities?

Visit cfainstitute.org/societies/challenge/industry to read more about the different sponsorship packages available for local, regional, and global levels of the Research Challenge.

SEIZE THE OPPORTUNITY

Don't miss out on this exciting opportunity to advance the industry while giving your firm great exposure on a local, national, and global stage.

To get involved, please email researchchallenge@cfainstitute.org. Visit cfainstitute.org/researchchallenge for more information.