

# CFA Singapore Claritas® Preparatory Course

- Delivered by senior finance industry practitioners
- 42 hours of face-to-face live training
- Available funding from Institute of Banking & Finance Singapore
- Career development workshops and networking opportunities for candidate members



Connect the dots today with **THE CLARITAS® INVESTMENT CERTIFICATE**.  
With a **82% passing rate**, CFA Singapore's prep course will help you sail through this global exam offered by the CFA Institute.



## CFA INSTITUTE CLARITAS® SYLLABUS

### MODULE 1 OVERVIEW

CHAPTER 1 The Investment Industry: A Top-Down View

### MODULE 2 ETHICS AND REGULATION

CHAPTER 2 Ethics and Investment Professionalism

CHAPTER 3 Regulation and Supervision

### MODULE 3 TOOLS AND INPUTS

CHAPTER 4 Financial Statements

CHAPTER 5 Quantitative Concepts

CHAPTER 6 Microeconomics

CHAPTER 7 Macroeconomics

CHAPTER 8 International Trade and Foreign Exchange

### MODULE 4 INVESTMENT INSTRUMENTS

CHAPTER 9 Equity Securities

CHAPTER 10 Debt Securities

CHAPTER 11 Derivatives

CHAPTER 12 Alternative Investments

### MODULE 5 INDUSTRY STRUCTURE

CHAPTER 13 Structure of the Investment Industry

CHAPTER 14 Investment Vehicles and Structures

CHAPTER 15 Investment Market Characteristics

### MODULE 6 INDUSTRY CONTROLS

CHAPTER 16 Investment Industry Documentation

CHAPTER 17 Risk Management

CHAPTER 18 Performance Evaluation

### MODULE 7 SERVING CLIENT NEEDS

CHAPTER 19 Investor Needs and Investment Policy

CHAPTER 20 Asset Allocation

CHAPTER 21 Active and Passive Investment Management

## COURSE OVERVIEW

**The Claritas® Investment Certificate** is a comprehensive global program designed to give all professional disciplines in financial services outside of investment roles a clear understanding of the investment industry and their professional responsibilities within it. The workforce competence of mid to back office staff in financial institutions is raised when employees understand industry functions, relationships and their role and professional responsibilities, helping them see where they fit in the big picture.

This program will benefit anyone working from client services to compliance; from human resources to IT; from sales and marketing to legal services.

CFA Singapore Society, a non-profit organization with more than 15 years of experience in conducting CFA Charter courses, is offering **The CFA Singapore Claritas® Preparatory Course** that helps you to pass the CFA Institute Claritas® Exam.

### ABOUT CFA SINGAPORE

Founded in September 1987, CFA Singapore is the first CFA member society of CFA Institute outside North America. CFA Institute is a global, non-profit member organization of financial analysts, portfolio managers, and other investment professionals.

The Society runs a whole host of programmes for members, CFA candidates and also the investment community, including Professional Development talks and seminars, Networking sessions, CFA information sessions and examination review classes, and Career Development talks.



# 95%

of candidates who have gone through  
**the Claritas® program** recommend it.

*"We intend to continue the program as part of our financial fundamentals training."*

Joe Dear  
Chief Investment Officer, CalPERS

Please contact me for the **CFA Singapore Claritas® Preparatory Course**

**Personal Particulars**

Name (as in Passport): \_\_\_\_\_ Age: \_\_\_\_\_ Gender: M / F

Identification card / Passport no.: \_\_\_\_\_ Nationality: \_\_\_\_\_

Contact phone: \_\_\_\_\_ Email: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_ Postal Code: \_\_\_\_\_

Employer: \_\_\_\_\_ Designation: \_\_\_\_\_

Highest Qualification: \_\_\_\_\_

Where/How did you know about our Claritas® programme?

(You may tick more than one option below)

- Info Session Preview Lecture     Emailer     CFA Singapore Website  
 Google Ads     Friends / Relatives

Others, please specify: \_\_\_\_\_

Course fees are an affordable S\$834.60 (incl GST) for 21 topics, which may be 50% subsidized by IBF for candidates sponsored by financial institutions <sup>1</sup>. Each Claritas® prep course will commence only if there are at least 15 participants. Classes will be conducted either weekday evenings and/or weekends.

<sup>1</sup>Company-sponsored: Singapore-based financial sector entities sponsoring staff for programmes must be financial institutions and other entities regulated by The Monetary Authority of Singapore (either licensed or exempted from licensing). To be eligible for FTS funding, sponsored staff should be: a Singapore Citizen or Singapore Permanent Resident; of executive level and involved in or supporting financial sector activities; physically based in Singapore.

Please tick one option below

Cheque (Bank, \*Cheque no.): \_\_\_\_\_

\*All cheques to be made payable to **CFA Singapore** and mailed to **CFA Singapore, 10 Shenton Way, #13-02 MAS Building, Singapore 079117.**

I authorize **CFA Singapore** to charge my credit card account for **EIGHT HUNDRED AND THIRTY FOUR SINGAPORE DOLLARS AND SIXTY CENTS** only (S\$834.60).

VISA/MASTERCARD/AMEX NUMBER: \_\_\_\_\_

Card Expiry Date: \_\_\_\_\_ Signature: \_\_\_\_\_