



**CFA Society  
South Africa**

## NEWSLETTER 1<sup>ST</sup> EDITION

February 2017

### INTRODUCTION

*From Philip Bradford, CFA  
President, CFA Society South Africa*

Welcome to the first edition of our CFA Society South Africa Newsletter. We will keep you up to date with all the past and future activities of the society. Our goal is to add value to our members predominantly via access to continuing education, networking and raising the profile of the CFA designation.

### EDUCATION & ENGAGEMENT

#### INFORMATION SESSIONS

An Intro Session was held in Cape Town on 6 February and will be held in Johannesburg on 13 February 2017 to provide potential CFA Level 1 Candidates and interested parties with information on the CFA Programme.

### CAREER DAYS

In 2016, CFA Career Days were held across the country at both school and university level, as well with the JSE.

### CFA INSTITUTE RESEARCH CHALLENGE 2016/2017



Winners of the CFA Institute Research Challenge: University of Cape Town.

The CFA Institute Research Challenge offers students the unique opportunity to learn from leading industry experts and compete with peers from the world's top finance programmes. The

company analysed during this challenge was Aspen. The winning team was from the University of Cape Town, who are due to compete in the EMEA Regional Finals on 26–27 April 2017 in Prague, Czech Republic. We wish them the best of luck.

### EX-SA ACTIVITIES

A board member travelled to Zimbabwe in November to lecture a group of CFA Level 1 candidates on the CFA curriculum. The trip was in response to a number of eager request from Zimbabwean candidates for access to tutoring services. The full-day lecture, which was held in Harare, was conducted free of charge for the participants and provided a platform for dialogue around greater levels of collaboration in Southern Africa. The Society plans to increase the number of these outreach trips in 2017 and is considering running similar programs in neighboring countries including Namibia and Botswana.

### OTHER NEWS

#### YOUNG ANALYST OF THE YEAR AWARDS

The local CFA Society collaborated with Intellidex in 2016 to judge the Young Analyst of the Year award at the annual FM Top Analyst Awards. CFA SA volunteers and board members graded the reports submitted by analysts under 30 years old in both the equity and non-equity categories. Calls for 2017 entries to sell-side research houses will begin in February 2017.

#### GLOBAL INVESTMENT CONFERENCE 2016

The annual local Global Investment Conference held in October 2016 proved hugely successful. Two top international speakers, Vikram Mansharamani and Willis Sparks, as well as a strong line-up of local speakers participated and provided an engaging platform for professionals to discuss a wide range of relevant industry-specific topics.

#### 2016 CHARTERHOLDERS

CFA SA sends its congratulations to all new CFA charterholders! We wish you all the best in your professional journey with the CFA Institute.

#### Contact Information

CFA Society South Africa  
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<https://www.cfasociety.org/southafrica/>



## IMPORTANT EVENTS

### “Building SA BRIC by BRIC” – Presentation by Glenn Silverman

All members are invited to attend the presentation, which aims to provide insight into each of the five BRICS countries and the lessons that South Africa needs to take from them, encapsulated into 'SA's Big Five'.

The presentation will be held on 9 February 2017 in Johannesburg and 16 February 2017 in Cape Town. Should members wish to attend, please RSVP with the local CFA Society.



Glenn Silverman.

### 70<sup>th</sup> CFA Institute Annual Conference

Sharpen your Investment Edge at the upcoming CFA Institute Annual Conference, which takes place from 21<sup>st</sup> to 24<sup>th</sup> May 2017 in Philadelphia, USA. Members are entitled to a discounted rate by applying the society promotional code, **SOCIETY17**, valid until 3 March 2017. Register now and take advantage of this special offer for the #CFAedge.

To find out more about our events, please visit our [website](#) or [facebook](#) page.

## COMMITTEE UPDATES

### Candidates

Over next couple of months, the Candidates portfolio has university and school career days in the pipeline, Intro sessions in Johannesburg and Cape Town as well as the second Africa outreach where we will be holding review sessions for Levels 1 and Level 2 in Harare presented by a board member. We are engaging with volunteers on various opportunities and are most grateful for all their input and enthusiasm.

### Standards & Advocacy

The advocacy team met with the CFA Institute EMEA team in Kenya recently to discuss pan-African advocacy issues, such as where we can use the resources available from the Institute to help regulators improve outcomes for investors on the continent. Meanwhile, in South Africa, the team is working to reach out to the regulator to give a bolder voice to CFA Charterholders in regulatory issues.

### Outreach

We have some exciting events for our ambassadors over the coming weeks including a visit to their companies with a member from the CFA Institute in London to hear their voices, as well as a “go-to-guide” introducing the various roles within the Investment Industry. We will also be hosting round-table events with various industry bodies and Regulators in April to discuss how we can collaborate more to ensure a stronger community of professionals. We are also planning SA’s first Ethics Challenge.

### Governance

Governance for our society addresses our Board governance and our relationships with our many stakeholders including our members, candidates, CFA Institute and the investing public. It is an ongoing process subject to continual revision and updating.

### Member Value

During the past year the Member Value portfolio has been hosting initiatives to see what interests the CFA South Africa member base. In particular, educational and networking events have been well received with positive feedback. In the coming year insightful educational and networking events will be arranged in both Johannesburg and Cape Town. We also intend to host smaller localised events, as well as more subject specific event sessions. Ideas or suggestions for initiatives are most welcome.

### Marketing & Communications

The CFA Institute has defined a broader mission, to speak with a bolder voice to a bigger community – this newsletter is a manifestation of improving communication with our members. Last year saw the launch of the global brand campaign to raise awareness of the value of the CFA charter – be on the lookout for more #CFAdifference in the months to come. We invite you to connect and communicate with our community via our social media channels.

## MEMBER CONNECT

### Jobline

Visit the [Jobline](#) on the Society website to view Job Specs for opportunities in the industry. Should your company wish to advertise positions, please contact us.

### Volunteers

CFA SA welcomes all members willing to volunteer their services. If interested, please reach out to the Society for more information.

### Events

Stay connected and get the most out of your society membership by attending one of our many upcoming events. Check out the [2017 events calendar](#) (updated monthly) on your local Society website.