



NEWSLETTER

DECEMBER 2020

Dear Valued Member

2020 will no doubt go down in history as a remarkable year and we would like to take this opportunity to reflect on key learnings of this crisis and are proud to showcase a number of industry leaders who share their insights.

View our [Reflections of 2020 Collection](#)



Volunteers Measure up!

To create positive change in the investment profession, we need your help, your passion and your ideas. Serving as a volunteer is one of the greatest and most impactful ways to contribute to our Society's combined success.

Visit our [2021 Volunteer Page](#) and find the right opportunity that fits your interests, competencies and availability.

Congratulations to **Rosanne Howarth, CFA**, who was presented the 2020 Volunteer of the Year award for her ongoing commitment to various Volunteer Initiatives throughout the years and her dedication to the Society.



DELIVERING MEMBER VALUE

Sharpen your skills in 2021

CFA Institute have launched **2021 Refresher Readings**, a new online learning module, which will give members a first look at what will change in the CFA Program through Refresher Readings and why these updates matter to practitioners like you.

CFA Society South Africa together with **Financial Training Solutions (FTS)** will be hosting a *CFA Program Refresher Series* covering the following topics in February and March 2021:

- [Back testing & Simulation](#)
- [Private Equity Investments](#)
- [Pricing and Valuation of Forward Commitments](#)
- [Private Wealth Management](#)

Join us to build on the practical knowledge and skills you need for 2021 and beyond.

BUILDING MARKET INTEGRITY

CFA Institute Asset Manager Code

Well done to **Sasfin Asset Managers** who is the latest South African firm to claim compliance with the global CFA Institute Asset Manager Code which outlines the ethical and professional responsibilities of firms that manage assets on behalf of clients.

The principles and provisions address six broad categories:

- loyalty to clients
- investments process and actions
- trading
- risk management
- compliance and support
- performance reporting and valuation and disclosure

To find out more about how your company can claim compliance [click here](#)



UPCOMING CONFERENCES

SAVCA 2021 Private Equity Conference

Southern African Venture Capital and Private Equity Association (SAVCA) has presented an annual private equity industry conference since 2008. The conference is a highlight of the industry calendar and a key deliverable by **SAVCA** to the private equity ecosystem in Southern Africa.

3 – 4 March 2021

Sun City, North West

(The conference will be held as an in-person & virtual event)

For more information [click here](#)

CFA Society South Africa members receive a discount, if you would like to register, kindly email admin@cfa.ac.za

FPI APPROVED ONLINE CONTENT

Build your CPD portfolio for free with CFA Society South Africa's channel on Asset TV. Take advantage of the 'downtime' and catch up on CPD content you may have missed.

View our top 5 viewed videos –

- Utilizing ESG data for sustainable investment Solutions by **Andrew Innes** - Head of EMEA Global Research and Design at S & P Dow Jones Indices (0.5 CPD Points)
- Ethical Decision Making by **Sonia Gandhi, CFA**- Director-Ethics Education & Professional Standards at CFA Institute (0.5 CPD Points)
- Volatility in uncertain times by **Chris Bennett, CFA** - Director, Index Investment Strategy at S & P Dow Jones Indices (0.5 CPD Points)
- Recent Market Tumult & the Prognosis for Value Investing by **Vitali Kalesnik** - Head of Research for Europe at Research Affiliates (0.5 CPD Points)
- Considering Credit Assets in Asset Allocation by **Johan Marnewick** - Portfolio Manager and Head of Credit Alternatives at STANLIB (0.5 CPD Points)

To view [click here](#)

CONNECT

Be part of the conversation, follow us and stay connected



For further information and enquiries contact Linda Hawkins, CFA Society South Africa Executive Officer

Contact (011) 011 9066

Email linda@cfa.ac.za