

Dear Valued Member,

This year CFA Society South Africa celebrates its 20th Anniversary, we reflect on the Society's accomplishments through the years, celebrating its achievements and continued growth. This is without a doubt attributed to the involvement of our members, the incredible contributions made by our volunteers, the collaborative efforts with our stakeholders, the professionalism of the executive office and the support of CFA Institute. We have come a long way over the past 20 years and we have much to be proud of.

[View](#) our 2020/2021 annual stakeholder report in which we showcase evidence of the way in which we strive to fulfil the mission of the Society.



[SAVE THE DATE](#)

What's happening in January:

Month end Masterclass in collaboration with ABSIP (The Association of Black Securities and Investment Professionals) focussing on South Africa's Equity Market

Join our specialist speakers as they discuss the structure and performance of the equities market, the number of companies listed on the JSE and how the structure has changed over time leading to concentration towards certain sectors/companies.

**26 January 2022
13h00(SAST)**

[REGISTER HERE](#)

ESG Certification Information session

CFA Society South Africa in collaboration with CFA Institute will host an online ESG Certification Information session. **Klaus Paesler, CFA** and **Julia Orlich** from CFA Institute will discuss the background of the certificate, ESG curriculum content and the benefits of the certificate.

**27 January 2022
13h00(SAST)**

[REGISTER HERE](#)

What's happening in February:

Global ESG Standards for Investment Products webinar

Guiding Principles and implementation

**2 February 2022
17h00(SAST)**

CFA Society South Africa 2022 Forecast Virtual Event

**9 February 2022
17h00(SAST)**



[VIEW ON DEMAND](#)

CFA Society South Africa Asset TV S.A Channel

In 2021 CFA Society South Africa presented various insightful webinars which are available to view-on-demand on our dedicated channel on Asset TV S.A

Geo-Economics chapters: The Interplay between Geopolitics, Economics, and Investments

Joachim Klement, CFP, CFA, Investment Strategist at Liberum presented a series on selected topics featured in the CFA institute Research Foundations monograph:

**Data - The Oil of the 21st Century
The Rivalry between the United States and China
The Geopolitics of renewable energy**

CFA Program Refresher Series webinar

CFA Society South Africa together with Edge Business School hosted a CFA Program Refresher Series covering the following topics:

**Private Equity Investments
Pricing and Valuation of Forward Commitments
Private Wealth Management
Back testing & Simulation
Private Company Valuation
ETF's: Mechanics and Applications
Fintech in Investment Management**

ESG Webinar Series

In preparation for the release of CFA Institute Exposure Draft of the ESG Disclosure Standards for Investment Products which was released on the 1st November 2021, CFA Society South Africa hosted a series of ESG Webinars:

**ESG-data
ESG-Attribution
CFA Institute ESG disclosure standards for investment products exposure draft**

Month end Masterclass

In collaboration with the Actuarial Society of South Africa (ASSA) this year we continued to provide our members with quality CPD content and insightful topics:

**Fixed Income
Liability Driven Investment (LDI)
Preparing your portfolio for Inflation**

[VIEW HERE](#)

UPDATES/ NEWS

CFA SOCIETY SOUTH AFRICA ANNUAL MEETING OF MEMBERS 2021

The CFA Society South Africa Annual Meeting of Members took place on the 24th of November 2021. CFA Society South Africa wishes to thank all the members who participated in the pre-voting and live voting of the 2020/2021 AMM. Quorum for the meeting was reached and all resolutions approved and results audited.

Visit our website to [view results](#).

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. We are excited to offer a wide range of initiatives, that you can consider applying your unique talents and expertise too. Visit our 2022 Volunteer Page and find the right opportunity that fits your interests, competencies and availability.

[View here](#)

LET'S PUT INVESTORS FIRST

CFA Society South Africa supports the inaugural Intellidex Top Investor Relations Survey. The survey gives investment analysts or professional investors the opportunity to rate the standard of their investor relations experience amongst the JSE-listed companies. CFA Society South Africa believes this is much needed barometer to assess the quality of investor relations at South Africa's listed companies and puts investors first.

We encourage members to support this initiative by completing the survey and help improve the quality of their engagement and encourage greater accessibility and transparency between listed companies and analysts to build better relationships.

Your invaluable feedback will take less than 10 minutes

[Complete survey here](#)

Closing Date: **15 December 2021**

Results will be published and promoted in early 2022 by media partner Business Day

For more information about the survey [click here](#)

CFA Institute Alpha Summit EMEA 2022

Alpha Summit EMEA is the "must attend" event of the year where you will have unique access to investment luminaries, thought leaders, and industry peers from around the world. Immerse yourself in an unforgettable experience designed to give investment professionals a new exciting perspective on the future.

15-16 February 2022

Free online event

13h00(SAST)

[Register here](#)

CONNECT

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