



## CFA Sri Lanka Fact Card

CFA Sri Lanka is an association of local investment professionals that promotes the highest ethical standards and professional excellence within the local investment community. Our membership of 134 members consists of portfolio managers, equity analysts, banking professionals, investment advisors, and other high-level financial practitioners. We have served CFA charterholders and CFA Program candidates locally since 2000

In line with our mission to promote the highest standards of ethics, education and professional excellence, we provide many continuing education opportunities to our members. These include educational events that are offered in a variety of formats to suit the needs of these busy professionals. Our flagship annual events include our Forecast and Capital Market Awards Night, a formal dinner involving an economic forecast discussion and the one of a kind CFA Industry Awards, the CFA Institute Research Challenge, a cross university real world challenge to analyze a chosen target company for a buy or sell recommendation and the Annual CFA Oration and Charter Awards Ceremony at which each year successful Level III CFA Program candidates are recognized together with a distinguished oration and presentation of awards. High-profile speakers who have presented at our events include Mr. Dev Ranasinghe, CEO, Bodyline, Justice Christopher Weeramanthry, Dr. Chitru Fernando, Mr. Lalith Kahatapitiya, CEO, Orange, Dr. Mahesha Ranasoma, CEO, Shell, Dr. Indrajit Coomaraswamy, Fmr. Director, Economic Affairs, Commonwealth Secretariat, Mr. Mangala Yapa, MD/CEO, Colombo Dockyard, Mr. Rajendra Theagarajah, MD/CEO, Hatton National Bank and Mr. Paul Smith, MD, Asia Pacific Region of CFA Institute.

CFASL holds educational seminars for its members during the year. These educational seminars are, on occasion, opened out to brokers, regulators and other members of the investment community. Some of the educational seminars held are:

- GIPS Seminar by Louise Boulanger, CFA
- “Monetary Disorder and the Role of Gold” by Louis Boulanger, CFA – Founder, LB Now Limited, Auckland, New Zealand
- “IFRS Implementation in Sri Lanka” by Manil Jayasinghe & Sanath Fernando of E&Y Colombo
- Commercial viability of Hydro Carbon resources in Sri Lanka” by Mr. Saliya Wickramasuriya, Director General, Petroleum Resources Development Secretariat
- “Socio-Economic Insights of Sri Lanka” - Dhishna Bastianz and Nihal De Silva of LMRB

- “The Euro Crisis and Potential Global Economic Imbalances” by Michael Preiss
- The Securities Research Workshop – Jeremy Bolland
- “How Real is Real Estate” – Hemaka De Alwis, Praveer Samarasinghe & B Premlal
- Sri Lanka’s Tourism Industry – Dominique Nordmann, Malin Hapugoda & Sean Mann

CFASL provides 10 - 13 scholarships for CFA students to do all 3 levels of the CFA Programme. In addition, CFASL will provide scholarships to regulators and to universities that are in partnership with CFA Institute.

#### CFA Sri Lanka Member Demographics

- Number of CFA charterholders - 132
- Gender – 22 Female / 110 Male
- Age distribution – 26 - 45

#### **CFA Institute – Overview**

CFA Institute sets the highest standards of ethics, education and professional excellence for the investment industry. The organization educates investment professionals using its global body of investment knowledge, which overcomes all aspects of the investment profession, including ethics. Currently, CFA Institute offers two education and credentialing programs: the CFA Program which confirms the Chartered Financial Analyst (CFA®) designation, and the Certificate in Investment Performance Measurement program, which confers the CIPM® designation.

- CFA Institute has more than 100,000 members in more than 130 countries, more than 87 percent of whom are CFA charterholders.
- Nearly 30 percent of members are responsible for managing assets of private individuals.
- 50 percent of the members work on the buy side.
- CFA Institute relies on its network of 135 member societies in 58 countries to serve as industry leaders.
- Our members’ varying occupations include portfolio managers, research analysts, chief executives, consultants, investment banking analysts, and relationship managers.