

CFA Institute Research Challenge in Switzerland and Liechtenstein

The CFA Institute Research Challenge is an annual global competition that provides university students with hands-on mentoring and intensive training in financial analysis and professional ethics.

The goal of the challenge is that students provide a firm valuation of a company, write an analyst report and present the results in front of an expert panel.

You will represent the University of Bern in a team and attend the course at the University of Lausanne.

Semester:	Fall 2020
Course form:	Seminar
ECTS:	6
Teams:	3-5 students (interdisciplinarity possible)
Prerequisites:	Some but not all team members need to be familiar with corporate valuation

About the course:

1. Analysis of a Public Company:

Teams research a publicly traded company. Company management presents to the teams and participates in a Q&A session.

2. Mentoring by a Professional Research Analyst:

Each team works with an investment professional, who mentors the team on research process and reviews and critiques its report.

3. Writing a Research Report:

Each team produces an initiation of coverage report on its chosen company. The report is reviewed and scored by a group of judges.

4. Presentation of Research to a High-Profile Panel of Experts:

Teams present their research to a panel of experts from top financial institutions. The team with the highest combined report and presentation score is the winner.

5. Advancement to the CFA Institute Global Challenge:

The winners of local competitions advance to compete against teams within their geographic region, culminating in a global finale competition.

Administrative details:

The course will be offered by the University of Lausanne by Prof. Dr. Norman Schürhoff.

The local mentor will be in Bern (Prof. Dr. Philip Valta).

Students can transfer their credits from the University of Lausanne to the University of Bern.

The Kick-Off Meeting will take place on 1 October 2020 (afternoon) in Zurich.

Contact:

If you are interested in attending the course and participating in the challenge, please contact:

Prof. Dr. Philip Valta
philip.valta@ifm.unibe.ch

Institute for Financial Management
University of Bern
Engenhaldenstrasse 4
CH – 3012 Bern
Tel: +41 (0) 31 631 37 12

Course website:
<http://www.cfainstitute.org/community/challenge/Pages/index.aspx>