



ASISA

ACADEMY

CFA LEVEL 1
EXAM READINESS
WORKSHOPS

BROCHURE

MARCH 2024

1. THE PURPOSE

The purpose of the CFA Level 1 Exam Preparation sessions is to equip delegates with the essential knowledge and skills required to excel in the Chartered Financial Analyst (CFA) Level 1 exam. These sessions aim to comprehensively cover the curriculum, focusing on key topics such as ethical and professional standards, quantitative methods, economics, financial reporting and analysis, corporate finance, equity investments, fixed income, derivatives, alternative investments, and portfolio management. Through structured study materials, practice questions, and interactive discussions, delegates will enhance their understanding of core concepts and develop effective exam-taking strategies. Ultimately, the goal is to empower delegates to confidently approach and succeed in the CFA Level 1 exam, thereby advancing their careers in the field of finance and investment management.

2. WORKSHOP TOPICS

The following topics will be covered during the sessions.

SESSIONS	DATE AND TIME	TOPIC
Prep session 1	Wednesday 22 May 2024	Topic 1: Ethical and Professional Standards
	14h00 – 18h00	Topic 2: Quantitative Methods
Prep session 2	Wednesday 5 June 2024	Topic 3: Economics
	14h00 – 18h00	Topic 4: Financial Statement Analysis
Prep session 3	Wednesday 19 June 2024	Topic 5: Corporate Issuers
	14h00 – 18h00	Topic 6: Equity Investments
Prep session 4	Wednesday 10 July 2024	Topic 7: Fixed Income
	14h00 – 18h00	Topic 8: Derivatives
Prep session 5	Wednesday 24 July 2024	Topic 9: Alternative Investments
	14h00 – 18h00	Topic 10: Portfolio Management & Wealth Planning
Prep session 6	Wednesday 7 August 2024	3-hour mock exam and 1-hour exam review
	14h00 – 18h00	

3. ACADEMY VISION & CONTEXT

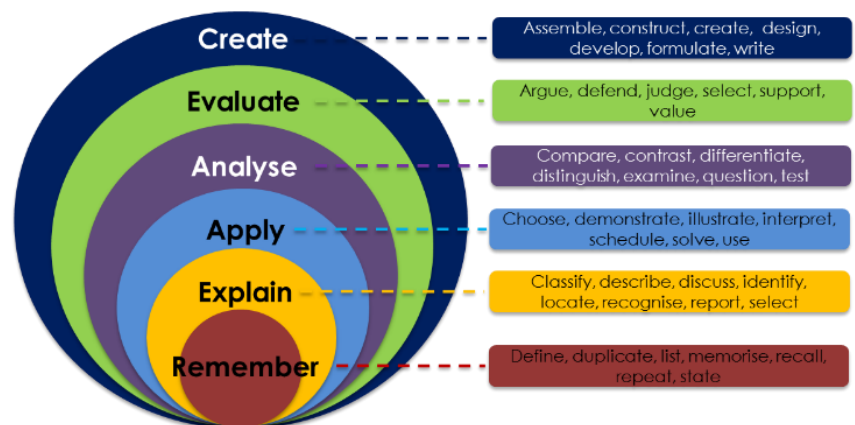
The ASISA Academy creates and delivers high-quality solutions to meet the skills development needs of South African Savings, Life Assurance, and Investment Management organisations. The Academy resulted from the need for a fresh approach to developing savings and investment management skills and achieving broader, more rapid transformation of the industry. The intention is to take delegates' learning beyond that of their tertiary studies using an approach that responds to industry realities and is delivered by industry experts in an academically sound manner.

In 2013 UCT officially endorsed four of the Academy's existing courses as UCT Short Courses which the Academy runs as official non-credit bearing UCT short courses. Delegates on each of these courses will need to pass the assessments to be awarded the UCT graduate certificate. The number and complexity of the assessments varies depending on the course.

More than 18,000 people in the Southern African financial services sector have learned with the ASISA Academy since 2008 with over 1000 industry presenters keeping the learning rooted in reality. The Academy has a Level 1 B-BBEE rating.

4. ACTIVE LEARNING

We work hard at the ASISA Academy to ensure every learning experience is as interactive as possible. To achieve this, we draw on the expertise of some of the most experienced and specialised professionals in the industry and we limit the size of our groups. The following diagram captures the Academy approach to learning. We aim to achieve the bulk of our learning in the biggest circles. Delegates will be required to bring a laptop or tablet in order to make full use of the online learning environment during the sessions.



5. OUR PRESENTER



Francois Toerien – PhD (Chemistry), MBA, CFA

Francois is an associate professor in finance in the Department of Tax and Finance at the University of Cape Town where he also serves as Finance Section Head. He teaches third and fourth year BBusSci, B Comm and Economics students. Prior to joining UCT he worked as an equity analyst for Allan Gray. Francois has been presenting on the Academy's programme for the past 12 years.

6. CONTACT INFORMATION

For course dates, venues, pricing, and other information please contact the ASISA Academy on:

- Email: LEARN@asisaacademy.org.za
- Landline: +27 21 673 1620
- Website: www.asisaacademy.org.za