



CFA Society  
Singapore



- CFA Singapore Fund Management Programme (IBF Level 1)
- CFA Singapore Research Programme (IBF Level 2/3)
- CFA Singapore Portfolio Management Programme (IBF Level 2/3)

- » Exclusive CFA® training provider for CFA Singapore
- » Approved Prep Provider by CFA Institute
- » Kaplan Financial and Kaplan Schweser – a compelling combination in CFA® training
- » Schweser study materials – including our world renowned SchweserNotes™
- » Thousands of students have gone through our doors
- » Voted Best Corporate Training Provider for Computer Science & IT, Finance Management and Senior Management & Leadership in 2017\*
- » Voted Top 3 Private School in Singapore (2013 to 2016)\*\*

\* JobsCentral Learning, Training & Education Development Awards 2017.

\*\* AsiaOne People's Choice Awards.





## About the Institute of Banking and Finance Singapore

The **Institute of Banking and Finance Singapore (IBF)** was established in 1974 as a not-for-profit industry association to foster and develop the professional competencies of the financial sector. IBF represents the interests of close to 200 member financial institutions covering banks, insurance companies, securities brokerages and asset management firms.

In partnership with the financial industry and training providers, IBF is dedicated to empowering practitioners with capabilities to support the growth of the Asian financial industry and to promote the Asian standard of excellence for practitioners in finance.

Working hand-in-hand with the individual practitioner and the industry, IBF aims to elevate individual competency whilst raising industry standards.

## About the IBF Standards

The IBF Standards represents a set of competency standards developed by the industry, for the industry. It provides a practice-oriented development roadmap for financial sector practitioners to attain the necessary training to excel in their respective job roles. Covering 12 industry segments spanning more than 50 specialisations, the IBF Standards offers a comprehensive suite of accredited training and assessment programmes to guide a financial sector practitioner from licensing examinations on through to professional certification across 3-levels: IBF Qualified (for new entrants); IBF Advanced (for senior practitioners and specialists); IBF Fellows (for industry veterans).

## Benefits of attending an IBF Accredited Training Programme

### Job Relevant Skills

IBF accredited programmes are designed to equip finance practitioners with competencies needed for their jobs. Such programmes are aligned with the IBF Standards, which are developed in close consultation with industry.

### Mark of Quality

IBF accredited programmes have a training and an assessment component, and are subject to an independent and rigorous review by the IBF to ensure that the training institution and programmes meet industry standards.

### Industry Recognition

Individuals who successfully complete an IBF accredited programme and meet the relevant criteria may apply for IBF Certification.

### Subsidised Programme Fees

Singaporeans and Singapore Permanent Residents who successfully complete an IBF accredited programme can apply for co-funding the IBF Standards Training Scheme at <https://www.ibf.org.sg/programmes/Pages/IBF-STs.aspx>.

Source: <https://www.ibf.org.sg/programmes/Pages/IBF-Accredited-Programmes.aspx>

## IBF Certification

Successful applicants will be awarded an IBF Certificate carrying a corresponding Certification Title – IBF Qualified and IBF Advanced.

### IBF Qualified

This Certification Title describes its holder as a new entrant who is equipped with broad-based capabilities and foundation competencies to be ready to undertake new roles. It is certified via IBF Level 1 Programmes.

### IBF Advanced

This Certification Title describes its holder as an experienced practitioner who has acquired applied knowledge and complex analytical skills for specialists or supervisory function. It can be certified via IBF Level 2 and/or Level 3 Programmes coupled with 3-15 years of experience.

Source: <https://www.ibf.org.sg/certification/Pages/Why-be-Certified.aspx>

Part of Kaplan Learning Institute, Kaplan Financial is one of Singapore’s leading providers of professional accounting and finance programme, having trained thousands of students to date.

With a focus on training excellence, Kaplan Financial has been accorded a number of honours by our partners, demonstrating our commitment to achieve excellent standards of learning facilities and provide outstanding student support. Widely recognised as an institution with dedicated lecturers and a proven track record of exceptional pass rates, Kaplan Financial will equip you with the skills and confidence you need to shine in the challenging accounting and finance industry.

## Why Kaplan Financial?



## ABOUT CFA SINGAPORE



Founded in 1987, CFA Singapore is the first CFA chapter to be formed outside of North America and one of the most active member society of the CFA Institute, the not-for-profit global association of investment professionals that sets the standard for professional excellence and credentials. CFA Singapore is the 7th largest society globally with more than **3,700 members** and organises about 100 events a year.

The mission of CFA Singapore is to lead the investment profession by promoting the highest standards of ethics, education and professional excellence for the ultimate benefit of society. This is implemented by member volunteers through the following 6 committees: Advocacy, Candidate Programmes, Career Development, Networking, Professional Development & University Outreach.

As an accredited IBF training provider, CFA Singapore developed various IBF accredited programmes for the investment management industry since 2009. In October 2016, CFA Singapore appointed Kaplan Learning Institute to be the exclusive education provider for the IBF-CFA Singapore accredited programmes, live and online preparatory courses for the Chartered Financial Analyst® exams.

For more information, please visit [www.cfasingapore.org](http://www.cfasingapore.org) or email [info@cfasingapore.org](mailto:info@cfasingapore.org).





## CFA Singapore Fund Management Programme (IBF Level 1)

### Programme Synopsis

This programme helps participants to be equipped with broad base capabilities and foundational competencies to undertake new roles. This involves developing in-depth industry and functional knowledge of investment products, in order to provide qualitative and quantitative reporting to investors, thus assisting them to make investment choices.

### Key Learning Objectives

- Demonstrate knowledge of the various investments products
- Understand key microeconomic topics
- Conduct research on current condition and future prospects of a given sector of the economy
- Understand general principles of the financial services industry
- Evaluate financial health of companies through financial reports (ie. income, cash flow, etc.)

### Who Should Attend:

- Entry-level hires and professionals with up to 3 years' experience in fund management.
- Professionals with non-financial background seeking entry into the financial services industry

### Course Delivery Support

- **14 sessions** of classroom-led instructions
- Schweser Study Materials
- Assessment

## CFA Singapore Research Programme (IBF Level 2/3)

### Programme Synopsis

This programme helps participants to acquire applied knowledge and complex analytical skills, which are internationally-accepted valuation methodology and techniques for specialists or leadership functions. This helps to provide investors with the most accurate value estimation, projection and investment recommendation for the chosen investment product.

### Key Learning Objectives

- Conduct economic, industry, and sectoral research
- Perform pro forma analysis to determine value of investment products
- Valuate investment price based on historical and pro forma data
- Provide research-driven investment recommendations
- Acquire and apply financial services industry product and knowledge
- Comply with financial services industry legislations, regulations, and industry codes of practices

### Who Should Attend:

- Professionals such as Investment Advisors with at least 3 years of fund management experience
- Participants who have completed CFA Singapore Fund Management Programme (IBF Level 1) or show proof of competency at Level 1 seeking entry into the financial services industry

### Course Delivery Support

- **9 sessions** of classroom-led instructions
- Schweser Study Materials
- Assessment

## CFA Singapore Portfolio Management Programme (IBF Level 2/3)

### Programme Synopsis

This programme helps participants to demonstrate professional mastery and exemplifies through leaderships and commitment to industry. This involves making decisions about investment mix and policy that are aligned with defined investment objectives, risk appetite and asset allocation guidelines of the chosen portfolio based on specific client requirements, whilst complying with regulations and industry codes of conduct.

### Key Learning Objectives

- Formulate portfolio strategy
- Allocate asset based on portfolio strategy
- Manage portfolio to achieve objectives
- Identify, report, and mitigate portfolio risks
- Identify specific portfolio performance factors
- Apply attribution analysis methods such as Multi-Factor, Style, and Return Decomposition Analysis

### Who Should Attend:

- Professionals such as Investment Advisors with at least 3 years of fund management experience
- Participants who have completed CFA Singapore Fund Management Programme (IBF Level 1) or show proof of competency at Level 1

### Course Delivery Support

- **7 sessions** of classroom-led instructions
- Schweser Study Materials
- Assessment



### CFA Singapore Fund Management Programme (IBF Level 1)

- Alternative Investments Product Knowledge
- Derivatives Product Knowledge
- Hedge Fund Product Knowledge
- Fixed Income Product Knowledge
- Private Equity Product Knowledge
- Real Estate Product Knowledge
- Venture Capital Product Knowledge
- Equity Product Knowledge
- Business Analysis
- Economic Analysis
- Industry and Sector Analysis
- Financial Services Industry Acumen
- Company Analysis
- Performance Measurement and Reporting
- Regulatory Compliance
- Fixed Income Valuation
- Derivatives Valuation
- Technical Analysis
- Quantitative Investing

### CFA Singapore Research Programme (IBF Level 2/3)

- Equity Valuation
- Private Equity Valuation
- Fixed Income Valuation
- Derivatives Valuation

### CFA Singapore Portfolio Management Programme (IBF Level 2/3)

- Equity Portfolio Management
- Fixed Income Portfolio Management
- Alternative Investment Portfolio Management
- Derivatives Portfolio Management
- Attribution Analysis
- Portfolio Risk Management

## MINIMUM ADMISSION REQUIREMENTS

Applicants must be either Singapore Citizens or PR and required to have a Bachelor's Degree or equivalent.

Documents required:

- University transcripts & certificate
- A scanned copy of NRIC



## IBF Standards Training Scheme (IBF-STS)

This programme has been accredited under the IBF Standards, and is eligible for funding under the IBF Standards Training Scheme (IBF-STS), subject to all eligibility criteria being met. Candidates are advised to assess the suitability of the programme and its relevance to their business activities or job roles. IBF-STS provides **70% funding** for direct training costs subjected to a cap of S\$7,000 per candidate per programme subject to all eligibility criteria being met. With effect from 1 July 2016, **Singapore Citizens** aged 40 years old and above are eligible for 90% co-funding of direct training costs, subject to a cap of S\$7,000 per participant per programme. For more information on funding, IBF Certification and Continuing Professional Development (CPD) requirements, please visit [www.ibf.org.sg](http://www.ibf.org.sg).

## Who Are Eligible?

### Self-sponsored Individuals

Non Company-sponsored participants are required to be Singapore Citizens or Singapore Permanent Residents physically based in Singapore.

### Company-sponsored Individuals

Company-Sponsored participants are required to be Singapore Citizens or Permanent Residents, physically based in Singapore and staff\* of Singapore-based financial sector entities being sponsored for the programmes. Financial sector entities would refer to financial institutions & entities regulated by MAS (either licensed or exempted from licensing). Entities that are significantly involved in supporting financial sector activities will be assessed for eligibility on a case-by-case basis.

To qualify for IBF-STS funding, trainees must successfully complete the training programme (including passing all relevant assessments and examinations). Staff who attend a programme in the capacity of an instructor or facilitator, e.g. presenter/speaker/panelist are not eligible for IBF-STS funding.

\* Qualifying expenses incurred on the training of both executive and non-executive staff, as well as staff employed on a short-term basis of less than one year (inclusive of contract staff and interns) will be eligible for funding under IBF-STS and FTS, subject to meeting the conditions under these schemes. License agents or representatives (i.e. financial advisors, traders, insurance agents, remisers) representing a legal principal entity may be included in the claims of the principal entity.

**Note: Reimbursement of fund is subject to assessment and meeting minimum attendance requirements. Duration of each assessment ranges from 1.5 hours to 3 hours, and number of assessments are at the discretion of Kaplan Learning Institute.**



## Schweser Essential Self-study Package



As a student of the CFA Singapore Fund Management Programme (IBF Level 1), CFA Singapore Research Programme (IBF Level 2/3), or CFA Singapore Portfolio Management Programme (IBF Level 2/3), you get to access the Kaplan Schweser study materials under the Schweser Essential Self-study Package to help you prepare for your assessments. Kaplan Schweser study materials are renowned for helping CFA candidates in their preparation for their CFA examinations, and the products in the Schweser Essential Self-study Package includes exams preparation tools relevant to students of the IBF-CFA Singapore accredited programmes. The Package contains the following:

### SchweserNotes™ Volumes 1-5

The 5-volume SchweserNotes™ provide clear, concise study notes and examples that cover every Learning Outcome Statement. Measure your progress with practice questions and realistic self-tests at the end of each topic.

### Schweser's QuickSheet

This compact study tool summarises key formulas, definitions, and concepts.

### Practice Exams

Once you know the concepts, apply the knowledge with practice exams. Identify the topics you are weak in, master the material, and gain the confidence you need to perform your best. Each volume of Practice Exams includes full exams, as well as the Online Performance Tracker, which allows you to compare your scores to other candidates.

### Study Calendar

This innovative tool takes the guesswork out of creating a prep plan! Prepare with a detailed study plan that shows you how to use your study materials in the most effective way possible.

## Instructor-Led Office Hours

Connect with an instructor during designated time to get your exam and content-related questions answered.

## SchweserPro™ QBank

After reading the SchweserNotes™, you can put what you've learned to practice with the QBank. Focus your attention where you need it the most and review critical concepts. It allows you to:

- Quiz yourself with thousands of multiple-choice questions
- Build custom exams using the topics and the number of questions you select
- View answer explanations and LOS summaries
- Access your QBank online, with available offline access

## 101 Must Knows

This late-season online study tool will give you practice answering exam-like questions. These quizzes, and included tutorials, are an ideal way to help you grasp the fundamentals of each topic as you advance with your study plan.

## Schweser Weekly Live Online Class



There is no better way to ensure content retention and instil exam confidence than by reinforcing your studies with Schweser Live Weekly Classes online. Should your work or other commitments affects your classroom attendance, our 15-week block of Online Classes led by CFA® charterholders can help you cover the same material at the same pace and frequency as our classroom sessions. It includes:

- On-Demand Video Lectures which are designed to be viewed prior to the Weekly Classes, covering every LOS.
- Archived sessions for you to review at your own pace.
- Two-volume set of Weekly Class Workbooks containing material, examples, and questions to support your study plan.

# KAPLAN FINANCIAL

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