

Polish your potential and let your CFA[®] Charter dream shine

With ICICIdirect Centre for Financial Learning's
Level I CFA[®] programme training



ICICIdirect Centre for Financial Learning (ICFL):

ICICIdirect Centre for Financial Learning is an educational initiative of ICICI Securities Ltd. ICFL is committed to enhance financial literacy amongst all existing and prospective stakeholders in the society, by empowering them to make better and more informed decisions. ICFL is also committed to lead the path to create next generation leaders who could catalyse the growth of financial markets in India by expanding the pool of qualified and certified professionals for the industry.



ICFL training programmes are categorised under:

1. Investment Education
2. Professional Certification and Development

Over the period, ICFL has trained more than 5.5 lakh students and investors across India through its various programmes. The repository of domain knowledge includes a host of in-house developed seminars, workshops, certifications and training programmes leading to reputed certifications. ICFL has offices and training facilities across India aided by technological capability and alliances to deliver trainings through e-Learning, virtual classrooms and satellite classrooms.

Chartered Financial Analyst® (CFA®) Programme:

The Chartered Financial Analyst® (CFA®) programme is a professional credential offered internationally by US based CFA Institute. The CFA® charter is a qualification for finance and investment professionals, particularly in the fields of investment management and financial analysis of stocks, bonds and their derivative assets. The programme focuses on portfolio management, financial analysis and provides generalist knowledge of finance.

Key Highlights:

- Real-world expertise: Demonstrate your fluency with an advanced investment management and analysis curriculum that leverages current best practices and the experience of practitioners around the world to bridge real-world practices and theoretical knowledge.
- Career recognition: Stand out in the competitive global industry and gain instant credibility with peers, employers, and clients who know the hard work, intelligence, and profound commitment it takes to earn the charter.
- Ethical grounding: Learn to apply ethical principles and gain a foundation in the skills needed to demonstrate a commitment to high standards of accountability and integrity that build a trusted reputation.
- Global community: Join a vast professional network of more than 135,000 charter holders worldwide and gain unmatched career resources, important relationships, and lifelong insights.
- Employer demand: The top 11 global employers of charter holders include JPMorgan Chase, Bank of America, Merrill Lynch, UBS, RBC, HSBC, Wells Fargo, Credit Suisse, Morgan Stanley, Smith Barney, Black Rock, and Citigroup



Source: www.cfainstitute.org.

Chartered Financial Analyst® (CFA®) Programme is ideal for:

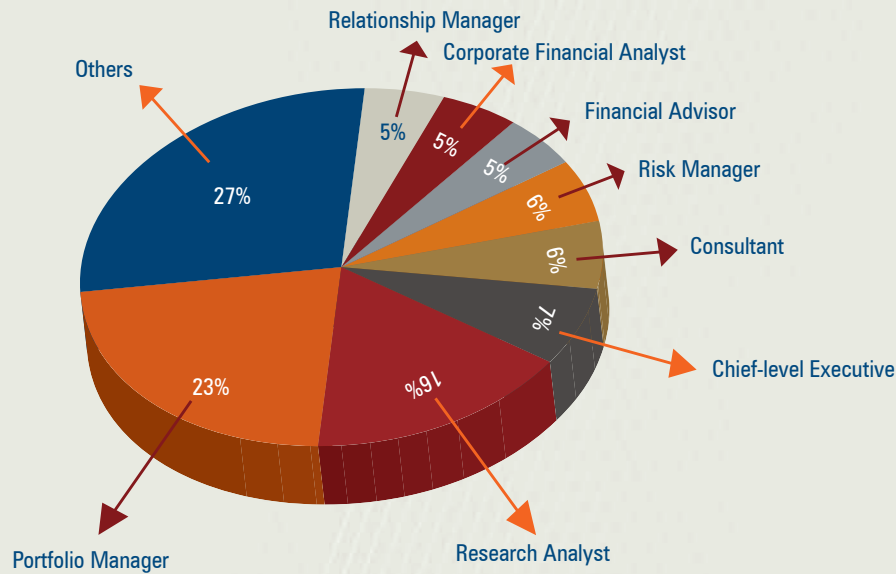
- Individuals working in the Financial Services sector
- Investment professionals who want to take their skills and marketability to the next level
- Individuals who want to change their career path and are interested in entering the world of investments
- Individuals working in investment / stock research firms
- Individuals working in corporate finance roles, business analysis and investment banking roles
- Students keen on starting their career in Investment and Finance
- CA's / CS's / ICWA's / CFP's and others having similar professional qualifications
- IT professionals working in BFSI domain



Employment Prospects:

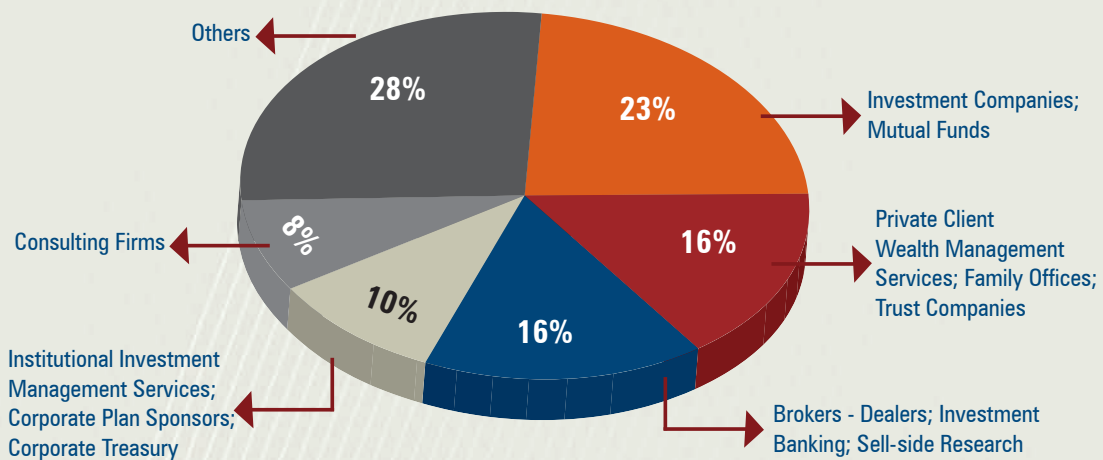
The CFA® programme equips you with the practical and fundamental knowledge you need for a wide variety of career choices in the investment profession. CFA® charterholders find that earning the CFA® charter provides them with a passport for working within numerous investment specialties and markets across the globe. It also equips them to change specialties as their careers evolve.

Top CFA® Charterholders Occupation:



Source: As of January 2016. Job function is self-reported and not verified by CFA Institute. The 30% not displayed are in job functions with less than 5% of members each.

Who employs CFA® Charterholders?



Source: As of January 2016. The above statistics are self-reported and not verified by CFA Institute.

ROAD MAP TO THE CFA® CHARTER

Bachelor's Degree or equivalent / in final year of Bachelor's Degree Programme

Enrolment

Level I Exam
(June or December)

Level II Exam
(June)

Level III Exam
(June)

- 4 years of relevant work experience
(Accumulated before, during or after exam)
- Professional conduct statement
- Join CFA Institute and apply for society membership
- Member dues
- CFA Institute member in good standing

Earn CFA® Charter

You can take the exam as long as you:

- Have a Bachelor's (or equivalent) Degree, are in the final year of your Bachelor's Degree at the time of registration, have four years of qualified, professional work experience or a combination of work / college experience that totals four years
- Meet the professional conduct admission criteria
- Can take the exams in English
- Have a valid international travel passport



CFA® Programme Curriculum and Exam Format:

Level I CFA® Exam

The Level I study programme focuses on basic knowledge of the below topics and simple analysis using investment tools.

Topics Covered:

Ethical and Professional Standards, Quantitative Methods, Economics, Financial Reporting and Analysis, Corporate Finance, Equity Investments, Fixed Income, Derivatives, Alternative Investments, Portfolio Management and Wealth Planning.

Exam Format:

240 total multiple choice questions (120 in the morning session and 120 in the afternoon session). Each multiple choice question is free-standing (not dependent on other questions) and has three possible answers: A, B, and C. All questions are equally weighted and there is no penalty for guessing.

Level I can be taken in June and December.

ICICIdirect Centre for Financial Learning Advantage:

- ICICIdirect Centre for Financial Learning is focussed to provide trainings in the financial domain for professional certifications in capital markets, financial planning and wealth management.
- All our faculty are certified professionals and not only have a rich experience as industry practitioners, but also have a flair to teach.
- With ICFL's exceptional teaching methodologies and comprehensive study tools, you will experience an excellent blend of academics and some of the best industry practices. This blend will ensure that you experience a highly practical and in-depth understanding.



ICFL's V-Class

V-class is our endeavor to introduce a learning platform that has features of real-time academic delivery with frequent learner interactions. The lectures are delivered by expert faculties, industry professionals and academicians from identified locations across the country. Equipped with its numerous functionalities, V-CLASS provides the student flexibility to attend the program at his / her convenience from an office or home and through any device (desktop, laptop or a hand held device). Depending on the course a student has opted for, he also has access to recorded sessions in case a class is missed or there is a need for revision.



The V-class Advantage

- **Expertise:** Access to a qualified faculty resource pool which includes domain experts, industry professionals and academicians from various locations
- **Experience:** A well-known brand with a experience of training more than 4.5 lakh learners through its various programmes
- **Technology:** Fully Online Course with LIVE online interactive lectures that provides classroom experience in a “virtual” environment. No isolated learning experience
- **Convenience*:** In the event that students misses attending the LIVE lecture on the Virtual Classroom for some reason, students can request for access to the recorded sessions
- **Comfort:** Student may learn from the comfort of his/her office/home

*Facility to access recorded sessions and access from outside ICFL premise depends on the course opted for.

Level I CFA® Programme Offering through V-Class

- **120+ hours of training through V-Class:** Well-structured and comprehensive virtual classroom training to help student's build the skills required to clear Level I CFA® charter exam
- **Online recorded sessions**
- **Study material:** Exhaustive printouts of the classroom presentation
- **Online mock tests:** Three online mock tests (300+ questions) with the answer key
- **Unit wise Online Question Bank**
- **Soft copy of formula charts**

Duration: 6 months

Additional Benefits for Level I CFA® Programme - V-Class Training:

- Free access to Foundation of Stock Investing programme delivered live by a stock market expert through V-Class
- Free access to our eLearn courses 'Gateway to Stock Investing' and 'Gateway to Futures & Options' that includes over 17 hours of interactive learning on stocks and derivatives for a period of six months

* The above three add-ons worth ₹5,000, will be offered complementary to all students.

Trainer Profiles*:

• Mr. Ankur Kulshrestha:

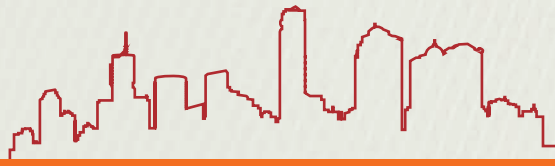
Mr. Ankur Kulshrestha is a CFA® charter holder and a fellow member of the Institute of Chartered Accountant of India (ICAI). He completed his CA in 2005, wherein he secured All India Ranks in all three stages, a milestone rarely heard of in ICAI's 60-year history. He is a graduate from Shri Ram College of Commerce, Delhi University and also has an M.Com degree. He has 10 years of experience in academics. He is a much sought-after trainer for the CFA® Programme, his online sessions being wired in more than 15 countries. He is an empanelled trainer with the Reserve Bank of India and also a certified valuator with immense experience in the field of valuation specialisation in Mergers & Acquisitions. He has presented several white papers at different industry forums. He started his corporate career with Suzuki India through campus placement after his CA in 2005. He moved to one of the world's largest consulting organisations, E&Y, in 2009 specialising in automotive sector consulting, a role which gave him rich exposure of handling international clients on critical issues.

• Mr. Neeraj Gupta:

Mr. Neeraj Gupta has a BBA(H), MBA (Finance) and completed Level III CFA® programme exam. He has 9 years of professional experience in the banking & financial service industry, and in the financial education domain. He is currently associated as a corporate trainer with the Bombay Stock Exchange, National Stock Exchange, ICICI Securities, Centre for Investment Education and Learning, NJ Gurukul India Ltd., and is a Certified Trainer and Assessor in the BFSI Sector Skill Council for the Pradhan Mantri Kaushal Vikas Yojana (Skill India).

• Mr. Pankaj Mani:

Mr. Pankaj Mani is a CQF holder from Fitch Learning, UK (the premier global qualification in Financial Engineering directed by the world-renowned Dr. Paul Wilmott, Founder Mathematical Finance and Oxford University) and an FRM holder from GARP, USA. He is PGDM (Finance) and Wealth Management Certified by the National University of Singapore jointly conducted as part of the PGDM Programme. He is acknowledged by the world's leading financial experts for his groundbreaking ideas and thoughts on mathematical finance. His area of research lies in the application of technology in Financial Trading & Risk Management e.g. Artificial Intelligence and Machine Learning, where he is also authoring papers under the guidance of world-renowned authorities. He is often invited by the Global Association of Risk Professionals, USA (New Delhi Chapter), with whom he is associated, to speak and address bankers, professionals and students. His key insights and ideas are much sought-after in the industry. He has been working for past seven years as an advisor to some of the leading and oldest proprietary trading desks, brokerage houses and other financial institutions in the domain of Quantitative Trading Strategies, Risk Modelling and Financial Modelling of Derivative products. He has also worked previously with ICICI Securities Ltd. He has a training experience of around four years for CFA® programme, FRM and Stock Markets courses.



For more details call to ICFL Team

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Our Authorised Learning Centre / Business Associate:



Emerging Brand Award
(4th CMO Asia Awards for Excellence
in Branding & Marketing, 2013 - 14)



Award for Innovation in Learning
(Best-in-class Learning &
Development Awards, 2013 - 14)



Best Online Learning Solution
(Best-in-class Learning &
Development Awards, 2013 - 14)

Our Recent Accolades

ICICI Securities Ltd.

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