



## Course and Examination Fact Sheet: Autumn Semester 2020

### 7,164: CFA Institute Research Challenge

ECTS credits: 4

#### Overview examination/s

(binding regulations see below)

Decentral - Group examination paper with presentation (all given the same grades) (100%)

Examination time: term time

#### Attached courses

Timetable -- Language -- Lecturer

[7,164,1.00 CFA Institute Research Challenge](#) -- Englisch -- [Orlov Vitaly](#)

#### Course information

#### Course prerequisites

The course requires good knowledge of basic macroeconomic principles and corporate finance, the completion of "Financial Markets" course is beneficial, but not required. This course does not have many prerequisites, but there is an expectation that students will have prior knowledge of techniques of business valuation.

#### Learning objectives

Students will have a real-life learning experience as an Equity Analyst, get hands-on mentoring, and will develop soft skills such as teamwork and presentation skills. Success in the challenge provides additional feature to CV, network with key employers, professionals and peers to make inroads within the financial services industry.

#### Course content

This is not a usual course, but rather a worldwide intercollegiate competition between teams of students, which provides unique educational opportunity to apply what you have already learned in the classroom to real-world practice in equity research. The course is organized by University of St. Gallen jointly with CFA Society for Switzerland and Liechtenstein. CFA Switzerland also provides practitioners for guest lectures to develop key skills and assign industry mentors and assist with developing of the final report.

#### Course structure

- **Early August:**official announcement of the challenge
- **Beginning of winter semester:**announcement of the subject company
- **October:** Kick-Off on 1 October 2020 (afternoon) in Zurich and Q3 2020 results
- **November:**conference call with the subject company on 12 November 2020 (afternoon)
- **November/December:**students work on reports
- **December:**presentations within the university
- **Early January:**report hand in for Swiss finalists
- **Early February:** Presentation Bootcamp
- **Mid February:**Presentation hand in for finalists
- **End of February:**Swiss local final in Zurich on 18 February 2021 (afternoon)
- **March:** Preparation of the local champion for EMEA championship
- **April:** EMEA Regional and Global Final (New York)

\*exact lecture dates will be announced during the semester and largely depend on the availability of industry professionals and CFA members. During this course the lecturer will provide more details. The grades will be given in the end of the Autumn



semester 2020.

## Course literature

There is no specific literature. Specific literature may be assigned individually.

## Additional course information

The lecture will be held with the CFA Association. In the case of the President's Board having to implement new directives due to the SARS-CoV-2 pandemic in AS2020, the course information listed above may be changed depending on the measures taken by CFA Association and more information will be provided directly by the lecturer.

## Examination information

### Examination sub part/s

#### 1. Examination sub part (1/1)

##### Examination time and form

Decentral - Group examination paper with presentation (all given the same grades) (100%)

Examination time: term time

##### Remark

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##### Examination-aid rule

Term papers

Term papers must be written without anyone else's help and in accordance with the known quotation standards, and they must contain a declaration of authorship which is a published template in StudentWeb.

The documentation of sources (quotations, bibliography) has to be done throughout and consistently in accordance with the chosen citation standard such as APA or MLA.

For papers in law, the legal standard is recommended (by way of example, cf. FORSTMOSER, P., OGOREK R. et SCHINDLER B., *Juristisches Arbeiten: Eine Anleitung für Studierende*, newest edition respectively, or according to the recommendations of the Law School).

The indications of the sources of information taken over verbatim or in paraphrase (quotations) must be integrated into texts in accordance with the precepts of the applicable quotation standard, while informative and bibliographical notes must be added as footnotes (recommendations and standards can be found, for example, in METZGER, C., *Lern- und Arbeitsstrategien*, newest edition respectively).

For any work written at the HSG, the indication of the page numbers is mandatory independent of the chosen citation standard. Where there are no page numbers in sources, precise references must be provided in a different way: titles of chapters or sections, section numbers, acts, scenes, verses, etc.

##### Supplementary aids

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##### Examination languages

Question language: English

Answer language: English

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## Examination content

Final term paper and presentation

## Examination relevant literature



TBA

### Please note

Please note that only this fact sheet and the examination schedule published at the time of bidding are binding and takes precedence over other information, such as information on StudyNet (Canvas), on lecturers' websites and information in lectures etc.

Any references and links to third-party content within the fact sheet are only of a supplementary, informative nature and lie outside the area of responsibility of the University of St.Gallen.

Documents and materials are only relevant for central examinations if they are available by the end of the lecture period (CW51) at the latest. In the case of centrally organised mid-term examinations, the documents and materials up to CW 42 are relevant for testing.

Binding nature of the fact sheets:

- Course information as well as examination date (organised centrally/decentrally) and form of examination: from bidding start in CW 34 (Thursday, 20 August 2020);
- Examination information (regulations on aids, examination contents, examination literature) for decentralised examinations: in CW 42 (Monday, 12 October 2020);
- Examination information (regulations on aids, examination contents, examination literature) for centrally organised mid-term examinations: in CW 42 (Monday, 12 October 2020);
- Examination information (regulations on aids, examination contents, examination literature) for centrally organised examinations: two weeks before the end of the registration period in CW 44 (Thursday, 29 October 2020).