

CFA Institute Global Investment Research Challenge

The University of Melbourne has been invited by the CFA Society of Melbourne (CFAM) to participate in this year's Investment Research Challenge. The Challenge is a competition in which student teams from the top local business schools write an equity research report on an assigned company and present their findings to a panel of investment industry experts. The winning team will advance to compete in regional, and ultimately, the final of the 5th Annual Global Investment Research Challenge hosted by the CFA Institute.

The Challenge consists of the following components:

- I. Analysis of a Public Company
- II. Mentoring by a Professional Research Analyst or Portfolio Manager
- III. Writing an Equity Research Report
- IV. Presentation of Research to a High-Profile Panel of Experts

For more information, please see: <http://www.cfainstitute.org/partners/girc/Pages/index.aspx>

There will be one selected team of 3-5 students which will represent The University of Melbourne in the local championships and if successful, in the regional and global competition. To participate, students must be enrolled at The University of Melbourne in Semester 2 and should not have had any material experience in a related field (please note that Vacation Work will not be considered material). Both Undergraduate and Postgraduate students are eligible to apply.

University of Melbourne Team Selection Process

- Students will be asked to put together a team of 3-5 students
- Note: If you are looking for a team to join, please post on the wall of our Facebook event so other students in the same position can contact you:
<http://www.facebook.com/home.php?#!/event.php?eid=128751217149054&ref=mf>
- Each team will be given a case study on a publicly-listed company
- Each team will be required to write a 2-page valuation report on the chosen company
- The best teams will be invited to present their analysis to a panel of judges (University of Melbourne staff) from which the top team will be selected to represent the University of Melbourne in the CFA Institute Global Investment Research Challenge.

To Register

(REGISTRATIONS CLOSE FRIDAY 2 JULY 2010!)

- Create a team of 3-5 students
- Email the following information about each student to competitions@fmaa.com.au:
 - Full student name
 - Student ID number
 - Degree
 - E-mail address

2010 Timeline

University Heat:

Friday 2 July - REGISTRATIONS CLOSE!
Monday 5 July - University of Melbourne case study is distributed to all registered teams
Wednesday 21 July - Valuation reports due
Friday 23 July - Top 4 successful teams will be invited to present their reports/analysis
Wednesday 28 July - Top 4 teams to present their valuation reports/analysis
Thursday 29 July - Chosen University of Melbourne team announced

Local Championships:

Tuesday 3 August - Cocktail Reception launch and company announcement
Wednesday 4 - Thursday 12 August - CFAM Skills Seminars (Ethics, Research skills, Report writing and Presentation skills)
Thursday 16 September - Final report submission
Thursday 23 September - Top 4 teams announced
Wednesday 6 October - Presentation to judging panel, Winner announced & Cocktail Reception

The Regional and Global championships will be held in 2011.