Barcelona Finance School

#BeFinance

Programa de certificació CFA Level 1

CFA Society Spain



www.barcelonafinanceschool.com



El primer pas per a obtenir la certificació més valorada a nivell internacional.

Prepara't per al primer nivell de certificació com Chartered Financial Analyst.

El programa de certificació CFA Nivell I et prepara per al primer dels 3 nivells per a ser acreditat com Chartered Financial Analyst, una de les certificacions amb major prestigi a nivell internacional en el món financer. Les classes s'impartiran en castellà i el material serà en anglès.

Aquesta certificació d'origen nord-americà acredita a analistes financers oferint-los una formació profunda en totes les àrees de l'anàlisi financera.

La Barcelona Finance School és l'escola de finances de l'Institut d'Estudis Financers, entitat sense ànim de lucre dedicada a l'educació financera des de fa més de 30 anys.

Patronat:

Sabadell · Santander · CaixaBank · CajaIngenieros · Generalitat de Catalunya Departament d'Economia i Hisenda · ICF Institut Català de Finances

Membre de:

EBTN · CRES · WorldBI · GBEStB Global Banking

Què t'ofereix aquest programa?

Desenvolupament Professional

Et permetrà especialitzar-te en anàlisi, gestió de carteres i banca d'inversió.

Certificació

El programa et prepararà per a superar amb èxit el Nivell I de la certificació oficial de prestigi internacional Chartered Financial Analyst (CFA) de CFA Institute.

Abonament a CFA Society Spain

El Programa inclou la condició d'abonats anuals de CFA SOCIETY SPAIN durant un any, la qual cosa et permetrà tenir accés a la borsa d'ocupació, esdeveniments, seminaris i descomptes en materials de suport de Kaplan-Schweser.



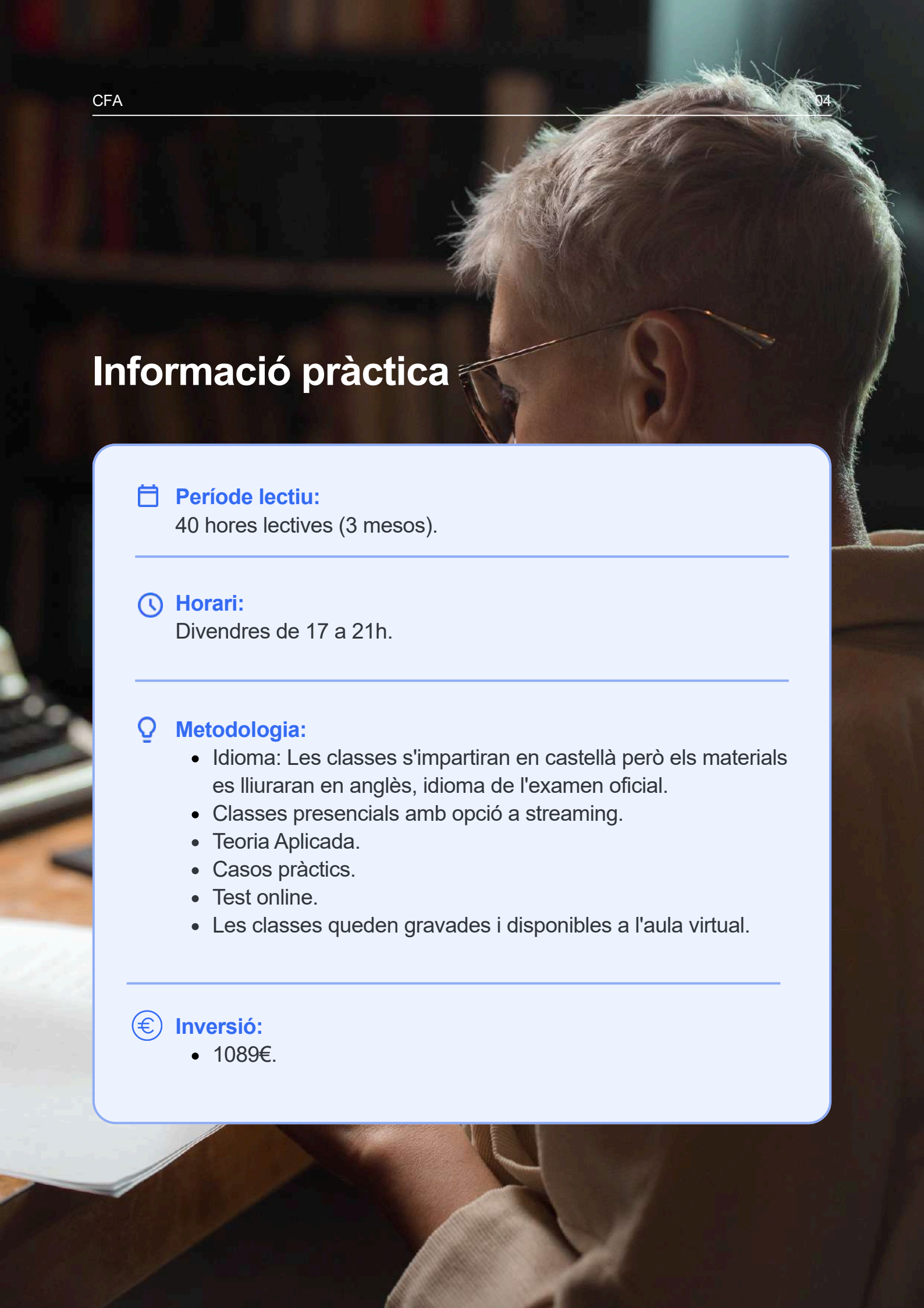
Què t'ofereix aquest programa?

De manera optativa i complementària al curs es pot adquirir el live package de Top Finance – CFA Society Spain per 450€ (valorat en 900€).

Inclou 40 hores de vídeo, tutories en línia, resums, 4.000 preguntes de question bank, dos llibres d'exàmens pràctics, entre altres:

- Schweser’s *QuickSheet.
- Practice Exams, Volumes 1&2.
- SchweserPro Qbank with +4000 questions.
- On Demand Instruction Vídeos.
- Instructor-Led Office Hours
- Secret Salze®.
- Self-Test Assessment.
- Early Start Guide.
- Candidate Resource Library.
- SchweserNotes Volumes 1-5.





Informació pràctica

Període lectiu:
40 hores lectives (3 mesos).

Horari:
Divendres de 17 a 21h.

Metodologia:

- Idioma: Les classes s'impartiran en castellà però els materials es lliuraran en anglès, idioma de l'examen oficial.
- Classes presencials amb opció a streaming.
- Teoria Aplicada.
- Casos pràctics.
- Test online.
- Les classes queden gravades i disponibles a l'aula virtual.

Inversió:

- 1089€.

Programa

*Les classes s'impartiran en castellà.

Module 1. Quantitative Methods.

1. Rates of Return.
2. Time Value of Money.
3. Statistical Methods of Asset Returns.
4. Probability Trees and Conditional Expectations.
5. Portfolio Mathematics.
6. Simulation Methods.
7. Estimation and Inference.
8. Hypothesis Testing.
9. Parametric and Non-Parametric Tests of Independence.
10. Simple Linear Regression.
11. Introduction to Big Data Techniques.

Module 2. Economics.

1. Microeconomics: Firms and the market structures.
2. Macroeconomics: Understanding business cycles.
3. Macroeconomics: Fiscal Policy.
4. Monetary and Fiscal Policy.
5. Introduction to Geopolitics.
6. International Trade.
7. Capital Flows and the FX Market.
8. Exchange Rate Calculations.

Module 3. Financial Statement Analysis.

1. Analysis of inventories.
2. Analysis of Long-term Assets.
3. Topics in Long-term Liabilities and Equity.
4. Analysis of income taxes.
5. Financial Reporting Quality.
6. Financial Analysis Techniques.
7. Introduction to Financial Statement.
8. Modelling.

Module 4. Corporate Issuers.

1. Organizational Forms, Corporate Issuer Features, and Ownership.
2. Investors and Other Stakeholders.
3. Corporate Governance: Conflicts, Mechanisms, Risks and Benefits.
4. Working Capital and Liquidity.
5. Capital Investments and Capital Allocation.
6. Capital Structure.
7. Business Models.

Module 5. Equity Investments.

1. Market Organization and Structure.
2. Security Market Indexes.
3. Market Efficiency.
4. Overview of Equity Securities.
5. Industry and competitive analysis.
6. Company analysis: forecasting.
7. Equity valuation: concepts and basics tools.

Module 6. Finxed Income.

1. Fixed-Income Cash Flows, Types, Issuance and Trading.
2. Fixed-Income Markets for Government and Corporate Issuers.
3. Fixed-Income Bond Valuation: Prices and Yields.
4. Yield and Yield Spread Measures for Fixed-Rate Bonds and Floating-Rate Instruments.
5. The Term Structure of Interest Rates: Spot, Par, and Forward Curves
6. Interest Rate Risk and Return.
7. Yield-Based Bond Duration Measures, Properties, Convexity and Portfolio Properties.
8. Curve-Based and Empirical Fixed-Income Risk Measures.
9. Credit Risk.
10. Credit Analysis for Government and Corporate Issuers.
11. Fixed-Income Securitization.
12. Asset-Backed Security (ABS) Instrument and Market Features.
13. Mortgage-Backed Security (MBS) Instrument and Market Features.

Module 7. Derivative Investments.

1. Derivative Instrument and Derivative Market Features.
2. Forward Commitment and Contingent Claim Features and Instruments.
3. Derivative Benefits, Risks, and Issuer and Investor Uses.
4. Arbitrage, Replication, and the Cost of Carry in Pricing Derivatives.
5. Pricing And Valuation of Forward Contracts and For an Underlying with Varying Maturities.
6. Pricing And Valuation of Futures Contracts.
7. Pricing And Valuation of Interest Rates and Other Swaps.
8. Pricing And Valuation of Options.
9. Option Replication Using Put-Call Parity.
10. Valuing A Derivative Using a One-Period Binomial Model.

Module 8. Alternative Investments.

1. Alternative Investment Features, Methods, and Structures.
2. Alternative Investment Performance and Returns.
3. Investments in Private Capital: Equity and Debt.
4. Real Estate and Infrastructure.
5. Natural Resources.
6. Hedge Funds.
7. Introduction to Digital Assets.

Module 9. Portfolio Management.

1. Overview.
2. Risk and Return.
3. Planning and Construction.
4. Introduction to Risk Management.

Module 10. Ethical and Professional Standards.

1. Professionalism.
2. Integrity of capital markets.
3. Obligations with clients and employers.
4. Investment analysis, recommendations and actions.
5. Conflicts of interest.
6. Responsibilities as a CFA Institute member or CFA Candidate.

Professorat

Josep Francesc Cahner - Charterholder CFA Level 3, Director comercial de Banca Privada en BBVA.

Enric Dalmau - Charterholder CFA Level 3, M&A and Corporate Development & Strategy.

Gemma Hurtado - Charterholder CFA Level 3, Head of Investment at Family Office & Board Member CFA Society Spain.

Pau Labró - Charterholder CFA Level 3, Director Financial Institutions at Fitch Ratings.

Álex Maura - Charterholder CFA Level 3, Portfolio Manager at Zurich Senior Fixed Income PM focusing on European IG Credit. Developing quant models.

Roger Mercader - Charterholder CFA Level 3, Real Estate Investments Corporate Finance Specialist. M&A.

Jordi Sebastià - Charterholder CFA Level 3, Fund Manager – Renta Variable en Solventis, SGIIC, S.A.

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Transforma el teu coneixement en impacte

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