

HKITI

香港投資培訓學院

We serve God by serving people

CFA Institute Prep Provider



CFA® Exam Prep Courses 2024 Level I, II & III

What is CFA Institute Prep Provider?

To be an official Prep Provider, Hong Kong Investment Training Institute Limited (HKITI) is required to submit all the course materials for approval every year, as of Feb 2024, **only 30 companies worldwide** received the title of **CFA Institute Prep Provider** to offer courses for all three levels. HKITI aims to equip students with comprehensive knowledge in finance based on official curriculum. Throughout the class, our trainer will arouse students interest in the subject areas through real life examples in Hong Kong context.

WHY HKITI?

Studying is many students' big investment in their career life. DO NOT risk your time and money in a school the lacks **quality** and **experience**.

- ✓ **High Quality** teaching (rated by students at 4.8/5.0)
- ✓ **Immediate Feedback** to students questions (rated by students at 4.85/5.0)
- ✓ **Over 17-year FULL-TIME** experienced lecturer
- ✓ Practical teaching with examples of Hong Kong companies

*This is a registered non-local course (No. 362928). It is a matter of discretion for individual employers to recognise any qualifications to which this course leads to. CFA Institute required disclosure: CFA Institute does not endorse, promote, or warrant the accuracy or quality of the products or services offered by Hong Kong Investment Training Institute Limited. CFA® are trademarks owned by CFA Institute.

LECTURER

Ted specialises in investment, asset valuation and economics. He taught **All Three Levels** of the Program and with **over 15 years of full-time experience**. Before his teaching career, he had 10 years of experiences in investment research. Ted conducted research on property market as well as financial analysis on investment projects in Hong Kong. He was once acted as a consultant to MTRC and the Hong Kong Airport Authority and as an in-house trainer for Langham Hotel Group.

Ted is highly applauded for **his clarity in explaining difficult concepts** and has **taught over 1,000 CFA candidates**. He was the lecturer in Master of Finance program in the Open University of Hong Kong. He is also a columnist writer for Eduplus magazine (Singtao Newspaper Group).



Ted Kwan, CFA

Apart from teaching, Ted is the Chairman of Fullness Christian Social Enterprise Ltd, aiming to provide vocational training for youth-at-risk in Hong Kong, which received the Outstanding Social Enterprise Award 2011 from the Hong Kong Government. He also served in the Continue Education Committee of the Hong Kong Society of Financial Analysts and received the **Decenary Service Award in 2011**.

Ted read his first degree in Hong Kong and subsequently a Master Degree in Singapore. He is a CFA charterholder since 2001.

TESTIMONIES

I followed Ted for **all three levels** of study, **his lectures were clear and precise**, . . . I could not finish them without your teaching. Really thanks for your teaching these years.

- Jason, PCCW

It was a great experience of taking your **CFA Level II & III course**. Your notes were **presented clearly and in good order** that helped me to understand the curriculum easily. Your patience and **prompt response to my questions** also impact me. Really appreciate for your help.

- Ivan Wong, UOB Group

. . . **All topics scored over 70%** . . . esp. the accounting and ethics sections (as a engineering background student). Thanks to **your excellent teaching and practical tips** in cracking questions . . . Thanks again!

- Jeff

. . . I have **passed my CFA Level II exam!** Instead of just memorising every stuff (like what I did in the past), . . . I had a **better understanding on the materials** after your teaching. Thank you once again".

- Christy, Bank of China

FREE SEMINAR

Our seminar provides detailed information about the CFA® program. You will have a chance to talk to our lecturer and seek career advice from professional who had worked as an equity analyst before.

Free seminar contents:

1. Demo lecture
2. Exam & studying techniques
3. Change in curriculum over years
4. Weightings and focus of different subject areas
5. Career advice

. . . reserve a seat now at www.hkiti.com.hk



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Practical Skills Module

<https://evolve.cfainstitute.org/practical-skills-modules.html>

- Start from 2024, candidate are required to finish ONE online self-learn video of about 10-15 hours.
- The contents are NOT examinable.
- Exam results will only be released when the candidate finish the learning
- Topics include: Python, Financial modelling, Analytical skills, AI & Machine learning.



Body of Knowledge

Level 3 – Portfolio Management

Strategic asset allocation
Institutional asset management

Level 2 – Asset Valuation

Equity, Alternatives, Derivatives, Fixed-incomes
Valuation models

Level 1 – Tools for Analysis

Economics, Statistics, Accounting

Exam Topics Weights

	Level I	Level II	Level III
Quantitative Method	6-9%	5-10%	--
Economics	6-9	5-10	--
Financial Statement Analysis	11-14	10-15	--
Corporate Issuers	6-9	5-10	--
Equity	11-14	10-15	10-15%
Fixed Incomes	11-14	10-15	15-20
Derivatives	5-8	5-10	5-10
Alternative Investments	7-10	5-10	5-10
Portfolio Management	8-12	10-15	35-40
Ethics & Standards	15-20	10-15	10-15
	100	100	100

Pass Rates

Level I 2023-08: **37%**
2023-11: **35%**

Level II 2023-05: **55%**
2023-08: **44%**

Level III 2023-05: **52%**
2023-08: **44%**



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CFA Level I Course

(For 2024 Aug & Nov Exam)

How to Prepare

Step 1 – Create the Study Plan

Each student will create a tailor-made study plan with our lecturer

Step 2 – Study with Online Video

Topics	Release date	Approx. duration
1. Quantitative Methods	May	5 hours
2. FSA	May	6 hours
3. Corp Issuers	May	4 hours
4. Ecoomics	June	3 hours
5. Portfolio Management	June	4 hours
6. Equity Investments	June	5 hours
7. Fixed Income	July	6 hours
8. Derivatives	July	4 hours
9. Alternative Investments	July	3 hours
10. Ethics	July	3 hours

Step 3 – Attend the Question Drilling Workshop (Face-to-face + Google Meet)

Topics	Date	Time
Drill 1 (Quants & FSA)	25 May 2024 (Sat)	10am-1pm
Drill 2 (Corp Issuers & Econ)	8 Jun 2024 (Sat)	10am-1pm
Drill 3 (Portfolio & Equity)	6 July 2024 (Sat)	10am-1pm
Drill 4 (Fixed & Derivatives)	20 July 2024 (Sat)	10am-1pm
Drill 5 (Alt Inv & Ethics) + Mock paper	3 Aug 2024 (Sat)	10am-1pm

Notes: Course notes and Mock paper are provided in hard-copy format only

Course Fee HKD6,880	Teaching Medium Cantonese (廣東話)	Class Venue Lee May Building, 788 Nathan Road, Prince Edward, Kowloon, HK
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CFA Level II Course

(For 2024 May, Aug & Nov Exam)

How to Prepare

Step 1 – Create the Study Plan

Each student will create a tailor-made study plan with our lecturer

Step 2 – Study with Online Video

Topics	Release date	Approx. duration
1. Quantitative Methods	4 Feb 2024	5 hours
2. Economics	11 Feb 2024	3 hours
3. Portfolio Management	18 Feb 2024	4 hours
4. Financial Statement Analysis	3 Mar 2024	8 hours
5. Corporate Issuers	10 Mar 2024	2 hours
6. Equity Investments	17 Mar 2024	6 hours
7. Alternative Investments	24 Mar 2024	2 hours
8. Fixed Income	7 Apr 2024	6 hours
9. Derivatives	14 Apr 2024	3 hours
10. Ethics	21 Apr 2024	2 hours

Step 3 – Attend the Question Drilling Workshop (Face-to-face + Google Meet)

Topics	Date	Time
Drill 1 (Quants & Econ)	25 Feb 2024 (Sun)	10am-2pm
Drill 2 (Portfolio & FSA)	17 Mar 2024 (Sun)	10am-2pm
Drill 3 (Corp Issuers & Equity)	7 Apr 2024 (Sun)	10am-2pm
Drill 4 (Alt Inv & Fixed)	21 Apr 2024 (Sun)	10am-2pm
Drill 5 (Der & Ethics) + Mock paper	28 Apr 2024 (Sun)	10am-2pm

Notes: Course notes and Mock paper are provided in hard-copy format only

Course Fee HKD6,880	Teaching Medium Cantonese (廣東話)	Class Venue Lee May Building, 788 Nathan Road, Prince Edward, Kowloon, HK
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CFA Level III (Video Class)

Lecture + Practice

For 2024 Aug Exam

Body of Knowledge	Date		Approx. Duration
Learn & Practice			
1. Capital Market Expectation	6 Apr 24	Sat	4 hours
2. Asset Allocation	13 Apr 24	Sat	4 hours
3. Asset Allocation	20 Apr 24	Sat	4 hours
4. Derivatives	27 Apr 24	Sat	4 hours
5. Currency	4 May 24	Sat	4 hours
6. Private Wealth Management	11 May 24	Sat	4 hours
7. PWM	18 May 24	Sat	4 hours
8. Institutional Investors + Case	25 May 24	Sat	4 hours
9. Fixed Income PM	1 Jun 24	Sat	4 hours
10. Fixed Income PM	8 Jun 24	Sat	4 hours
11. Equity Portfolio Management	15 Jun 24	Sat	4 hours
12. Equity + Alternative Inv	22 Jun 24	Sat	4 hours
13. Alt Inv & Trading	29 Jun 24	Sat	4 hours
14. Performance and Manager Selection	6 Jul 24	Sat	4 hours
15. GIPS & Ethics	13 Jul 24	Sat	4 hours
16. Going thru' a CFA Mock paper	20 Jul 24	Sat	4 hours
17. Revision & Mock paper release	27 Jul 24	Sat	3 hours

Notes: Course notes and Mock paper are provided in hard-copy format only

Course Fee

HKD6,880

Teaching Medium

Cantonese (廣東話)

Class Venue

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Prince Edward, Kowloon, HK



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COURSE REGISTRATION FORM

✉ cs@hkiti.com.hk

☎ 6283 7144



<https://forms.gle/RsPHaqzagF1qmZPJA>

Entry Requirements

There is no specific entry requirements for the CFA® Program exam prep course, however, students have to ensure that they meet the requirements to take the corresponding exam. Please refer to www.cfainstitute.org for the up-to-date requirements.

Refund policies and other Rules and Regulations

1. All fee paid less application fee will be refunded if the course is withdrawn or not offered.
2. On premature cessation of the course, all fees and charges that have been collected in respect of any part of the course failing to be conducted on or after the date of the cessation will be refunded within 1 month of the premature cessation.
3. Enrolment will be recognised upon receipt of the payment before the commencement date of the course..
4. The course fee received is non-transferable.
5. When typhoon signal no. 8 or black rain signal is hoisted on the day of the course, the class will be automatically cancelled . A replacement class will be rearranged on another day.
6. Students are not allowed to record or videotaped the class in whatsoever circumstances.
7. **Copyright Notice:** The course notes, materials, audio and visual materials distributed through the class are subject to the law of Copyright in Hong Kong. Unauthorized copying, sharing or downloading are in breach of laws of Hong Kong and is a violation of Code of Ethics and Professional Standard of CFA Institute, no part of the shared materials may be reproduced, or transmitted or stored or downloaded in any form or by any means, without prior permission from Hong Kong Investment Training Institute Limited. Hong Kong Investment Training Institute Limited reserves the right to take legal action to anyone who violates it. Violation cases will be reported to CFA Institute directly and would result in removal of CFA candidacy or charter status.
8. The above rules and regulations are subject to change without prior notice.
9. We reserve the right to disqualify the enrolment eligibility of the student for any misbehaviour and violation to the above rules and regulations.