

# Syllabus

## *Course Description*

Course Title	CFA Preparation
Course Code	25412
Course Title Additional	
Scientific-Disciplinary Sector	ECON-09/A
Language	English
Degree Course	Master in Accounting and Finance
Other Degree Courses (Loaned)	
Lecturers	Dr. Dmitri Boreiko, Dmitri.Boreiko@unibz.it <a href="https://www.unibz.it/en/faculties/economics-management/academic-staff/person/1070">https://www.unibz.it/en/faculties/economics-management/academic-staff/person/1070</a>
Teaching Assistant	
Semester	Second semester
Course Year/s	2
CP	3
Teaching Hours	18
Lab Hours	-
Individual Study Hours	-
Planned Office Hours	9
Contents Summary	<ul style="list-style-type: none"> <li>• The course provides an introduction to the CFA Level I curriculum, with a primary focus on portfolio management and asset analysis, which together represent about 45% of the exam.</li> <li>• It familiarizes students with key concepts in equity, fixed income, derivatives, and alternative investments.</li> <li>• Designed as an 18-hour compact course, it serves as a strong foundation for further independent CFA Level I preparation.</li> <li>• Official CFA Institute materials and practice sets are used throughout the course.</li> </ul>
Course Topics	The course covers these topics (from CFA Level I Exam

	Curriculum): <ul style="list-style-type: none"> <li>• Corporate Issuers</li> <li>• Portfolio Management</li> <li>• Assets</li> <li>• Equity Investments</li> <li>• Fixed Income</li> <li>• Derivatives</li> <li>• Alternative Investments</li> </ul>
<b>Keywords</b>	CFA Exam, Corporate Finance, Alternative Investments, Equity, Fixed Income
<b>Recommended Prerequisites</b>	Finance courses at undergraduate level
<b>Propaedeutic Courses</b>	
<b>Teaching Format</b>	Frontal Lectures and exercise sessions.
<b>Mandatory Attendance</b>	Highly advisable
<b>Specific Educational Objectives and Learning Outcomes</b>	<p>ILO (Intended Learning Outcomes)</p> <p>ILO 1 – Knowledge and Understanding:</p> <p>ILO 1.1 Knowledge of the fundamentals of corporate finance for the correct application, for example, of decision-making models and the management of financial data and risks in treasury management</p> <p>ILO 1.2 Knowledge of specific Finance topics that characterize the profession of Financial Analyst, Portfolio Manager, Chief Financial Officer (CFO), Administrative Manager, Controller, Internal Auditor, and Business Consultant</p> <p>ILO 2 – Applying Knowledge and Understanding:</p> <p>ILO 2.1 Ability to analyze complex problems in a national and international interdisciplinary context</p> <p>ILO 3 – Making Judgments:</p> <p>ILO 3.1 Ability to apply acquired knowledge to make strategic and operational decisions and to solve administration and finance problems in companies, intermediaries, and financial markets, considering multiple perspectives of analysis simultaneously, from economic to legal, financial, strategic, and managerial</p>

	<p>ILO 3.2 Ability to select data and use appropriate information to describe a problem related to the management of companies, intermediaries, and financial markets.</p> <p>ILO 3.3 Ability to relate models and empirical evidence in the study of companies, intermediaries, and financial markets</p> <p>ILO 4 – Communication Skills:</p> <p>ILO 4 Ability to communicate effectively, both orally and in writing, the specialized content of individual disciplines, using different registers depending on the audience and the communicative and educational purposes, and to evaluate the educational impact of such communication</p> <p>ILO 5 – Learning Skills:</p> <p>ILO 5.1 Ability to identify thematic connections and establish relationships between different cases and contexts of analysis</p> <p>ILO 5.2 Ability to frame a new problem systematically and generate appropriate taxonomies</p> <p>ILO 5.3 Ability to develop general models based on the phenomena studied</p>
<b>Specific Educational Objectives and Learning Outcomes (additional info.)</b>	to introduce students to the CFA Exam.
<b>Assessment</b>	<p>Coursework on ethical aspects of investment industry.</p> <p>Closed-book exam on selected topics from CFA Exam.</p>
<b>Evaluation Criteria</b>	<p>Coursework on ethical aspects of investment industry - 30% of the mark</p> <p>Closed-book exam on selected topics from CFA Exam - 70% of the mark.</p> <p>ILO 1-5 assessed</p>
<b>Required Readings</b>	CFA Exam Level I Curriculum.
<b>Supplementary Readings</b>	No
<b>Further Information</b>	No
<b>Sustainable Development</b>	Responsible consumption and production, Industry, innovation and

Goals (SDGs)	infrastructure
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