

Syllabus

Kursbeschreibung

	1
Titel der Lehrveranstaltung	CFA Preparation
Code der Lehrveranstaltung	25412
Zusätzlicher Titel der Lehrveranstaltung	
Wissenschaftlich- disziplinärer Bereich	SECS-P/09
Sprache	Englisch
Studiengang	Master in Accounting und Finanzwirtschaft
Andere Studiengänge (gem. Lehrveranstaltung)	
Dozenten/Dozentinnen	Dr. Dmitri Boreiko, Dmitri.Boreiko@unibz.it https://www.unibz.it/en/faculties/economics- management/academic-staff/person/1070
Wissensch. Mitarbeiter/Mitarbeiterin	
Semester	Zweites Semester
Studienjahr/e	2
KP	3
Vorlesungsstunden	18
Laboratoriumsstunden	-
Stunden für individuelles Studium	-
Vorgesehene Sprechzeiten	9
Inhaltsangabe	 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. It familiarizes students with key concepts in equity, fixed income, derivatives, and alternative investments. Designed as an 18-hour compact course, it serves as a strong foundation for further independent CFA Level I preparation.

	Official CFA Institute materials and practice sets are used throughout the course.
Themen der	The course covers these topics (from CFA Level I Exam
Lehrveranstaltung	Curriculum):
	Corporate Issuers
	Portfolio Management
	• Assets
	Equity Investments
	Fixed Income
	• Derivatives
	Alternative Investments
Stichwörter	CFA Exam, Corporate Finance, Alternative Investments, Equty,
	Fixed Income
Empfohlene	Finance courses at undergraduate level
Voraussetzungen	
Propädeutische	
Lehrveranstaltungen	
Unterrichtsform	Frontal Lectures and exercise sessions.
Anwesenheitspflicht	Highly advisable
Spezifische Bildungsziele	Knowledge and understanding:
und erwartete	Master's degree graduates should be able to acquire an advanced
Lernergebnisse	level of preparation that allows for an in-depth and integrated view
	of accounting and budgeting and planning and management
	control issues. These learning outcomes are achieved through an
	advanced knowledge and understanding
	- of economic-financial communication to stakeholders in national
	and international contexts;
	- of economic-business models and performance measurement for
	planning and management control of internal and external audit
	models and methods.
	The Accounting courses will also enable graduates to acquire skills
	in specialised subjects that characterise the profession of chartered
	accountants and auditors.
	Master's graduates should be able to acquire a knowledge of the
	legal instruments that enable them to deal with the management
	problems of companies and financial intermediaries, as well as an
	understanding of the mechanisms of the functioning of financial
	markets. These learning outcomes are achieved through an

advanced knowledge and understanding

- of the principles of contract law and commercial law to be considered in the management strategies of companies and financial intermediaries;
- of tax law principles for the definition of the company's tax policy,
 also in an international perspective;
- the principles of bankruptcy law for the management of company crises, restructuring and risks;
- of banking and financial law principles affecting the management of financial institutions and financial investments;
- the impact of taxation on business decision-making models.

Applying knowledge and understanding:

Ability to apply knowledge in the area of Accounting for the analysis and solution of complex problems in national and international interdisciplinary contexts

Ability to apply knowledge in the area of Accounting to develop and integrate the results of economic-financial communication in business decision models

Ability to apply knowledge in the area of Accounting for the design and management of corporate restructuring and other extraordinary transactions

Ability to apply knowledge in the area of Accounting in order to be able to dialogue and interact in a competent manner with the managers of the various corporate functional areas, with financial markets and with corporate and tax law professionals

Ability to apply knowledge in the area of Law in order to evaluate and decide the legal form of the organisation, also in relation to interactions with its stakeholders

Ability to apply knowledge in the area of Law to analyse and integrate legal and fiscal effects in the design and implementation of corporate restructuring operations and other extraordinary operations, also in an international context

Ability to apply knowledge in the area of law to be able to dialogue and interact critically and competently with corporate and tax law professionals

Making judgements:

Ability to apply acquired knowledge to make managerial and operational decisions and to solve problems in the administration



and financial markets. Ability to relate models and empirical evidence in the study of companies, intermediaries and financial markets. Communication skills: Ability to communicate effectively in oral and written form the specialised contents of the individual disciplines, using different registers according to the recipients and the communicative and didactic purposes, and to evaluate the formative effects of its communication Learning skills: a) ability to use information technology autonomously to carry out bibliographic research and investigations and for one's own training and updating b) ability to identify thematic links and establish relationships between different cases and contexts of analysis c) ability to frame a new problem systematically and to generate appropriate taxonomies d) ability to develop general models from the phenomena studied. Spezifisches Bildungsziel und erwartete Lemergebnisse (zusätzliche Informationen) Art der Prüfung Coursework on ethical aspects of investment industry. Closed-book exam on selected topics from CFA Exam. Bewertungskriterien Coursework on ethical aspects of investment industry - 30% of the mark Closed-book exam on selected topics from CFA Exam - 70% of the mark. CFA Exam Level I Curriculum.		1
Ability to communicate effectively in oral and written form the specialised contents of the individual disciplines, using different registers according to the recipients and the communicative and didactic purposes, and to evaluate the formative effects of its communication Learning skills: a) ability to use information technology autonomously to carry out bibliographic research and investigations and for one's own training and updating b) ability to identify thematic links and establish relationships between different cases and contexts of analysis c) ability to frame a new problem systematically and to generate appropriate taxonomies d) ability to develop general models from the phenomena studied. Spezifisches Bildungsziel und erwartete Lernergebnisse (zusätzliche Informationen) Art der Prüfung Coursework on ethical aspects of investment industry. Closed-book exam on selected topics from CFA Exam. Bewertungskriterien Coursework on ethical aspects of investment industry - 30% of the mark Closed-book exam on selected topics from CFA Exam - 70% of the mark. Pflichtliteratur CFA Exam Level I Curriculum.		jointly taking into consideration multiple perspectives of analysis, from economic to legal, financial, strategic, managerial Ability to select data and use appropriate information to describe a problem concerning the management of companies, intermediaries and financial markets. Ability to relate models and empirical evidence in the study of companies, intermediaries and financial markets.
a) ability to use information technology autonomously to carry out bibliographic research and investigations and for one's own training and updating b) ability to identify thematic links and establish relationships between different cases and contexts of analysis c) ability to frame a new problem systematically and to generate appropriate taxonomies d) ability to develop general models from the phenomena studied. Spezifisches Bildungsziel und erwartete Lernergebnisse (zusätzliche Informationen) Art der Prüfung Coursework on ethical aspects of investment industry. Closed-book exam on selected topics from CFA Exam. Bewertungskriterien Coursework on ethical aspects of investment industry - 30% of the mark Closed-book exam on selected topics from CFA Exam - 70% of the mark. Pflichtliteratur CFA Exam Level I Curriculum.		Ability to communicate effectively in oral and written form the specialised contents of the individual disciplines, using different registers according to the recipients and the communicative and didactic purposes, and to evaluate the formative effects of its
b) ability to identify thematic links and establish relationships between different cases and contexts of analysis c) ability to frame a new problem systematically and to generate appropriate taxonomies d) ability to develop general models from the phenomena studied. Spezifisches Bildungsziel und erwartete Lernergebnisse (zusätzliche Informationen) Art der Prüfung Coursework on ethical aspects of investment industry. Closed-book exam on selected topics from CFA Exam. Bewertungskriterien Coursework on ethical aspects of investment industry - 30% of the mark Closed-book exam on selected topics from CFA Exam - 70% of the mark. Pflichtliteratur CFA Exam Level I Curriculum. Weiterführende Literatur		a) ability to use information technology autonomously to carry out bibliographic research and investigations and for one's own training
Spezifisches Bildungsziel und erwartete Lernergebnisse (zusätzliche Informationen) Art der Prüfung Coursework on ethical aspects of investment industry. Closed-book exam on selected topics from CFA Exam. Bewertungskriterien Coursework on ethical aspects of investment industry - 30% of the mark Closed-book exam on selected topics from CFA Exam - 70% of the mark. Pflichtliteratur CFA Exam Level I Curriculum.		b) ability to identify thematic links and establish relationships between different cases and contexts of analysis c) ability to frame a new problem systematically and to generate appropriate taxonomies
Art der Prüfung Coursework on ethical aspects of investment industry. Closed-book exam on selected topics from CFA Exam. Bewertungskriterien Coursework on ethical aspects of investment industry - 30% of the mark Closed-book exam on selected topics from CFA Exam - 70% of the mark. Pflichtliteratur CFA Exam Level I Curriculum. Weiterführende Literatur	Spezifisches Bildungsziel und erwartete Lernergebnisse (zusätzliche Informationen)	to introduce students to the CFA Exam.
mark Closed-book exam on selected topics from CFA Exam - 70% of the mark. Pflichtliteratur CFA Exam Level I Curriculum. Weiterführende Literatur	Art der Prüfung	
CFA Exam Level I Curriculum. Weiterführende Literatur	Bewertungskriterien	mark Closed-book exam on selected topics from CFA Exam - 70% of the
Weiterführende Literatur	Pflichtliteratur	CFA Exam Level I Curriculum.
	Weiterführende Literatur	No



Weitere Informationen	No
Ziele für nachhaltige	Nachhaltiger Konsum und Produktion, Industrie, Innovation und
Entwicklung (SDGs)	Infrastruktur