

Syllabus

Course Description

Course Title	CFA Preparation
Course Code	25412
Course Title Additional	
Scientific-Disciplinary Sector	SECS-P/09
Language	English
Degree Course	Master in Accounting and Finance
Other Degree Courses (Loaned)	
Lecturers	Dr. Dmitri Boreiko, Dmitri.Boreiko@unibz.it https://www.unibz.it/en/faculties/economics-management/academic-staff/person/1070
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"> • 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.
Course Topics	The course covers these topics (from CFA Level I Exam

	Curriculum): <ul style="list-style-type: none"> • Corporate Issuers • Portfolio Management • Assets • Equity Investments • Fixed Income • Derivatives • Alternative Investments
Keywords	CFA Exam, Corporate Finance, Alternative Investments, Equity, Fixed Income
Recommended Prerequisites	Finance courses at undergraduate level
Propaedeutic Courses	
Teaching Format	Frontal Lectures and exercise sessions.
Mandatory Attendance	Highly advisable
Specific Educational Objectives and Learning Outcomes	<p>Knowledge and understanding:</p> <p>Master's degree graduates should be able to acquire an advanced 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</p> <ul style="list-style-type: none"> - 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. <p>The Accounting courses will also enable graduates to acquire skills in specialised subjects that characterise the profession of chartered accountants and auditors.</p> <p>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</p> <ul style="list-style-type: none"> - 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,

	<p>also in an international perspective;</p> <ul style="list-style-type: none"> - 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. <p>Applying knowledge and understanding:</p> <p>Ability to apply knowledge in the area of Accounting for the analysis and solution of complex problems in national and international interdisciplinary contexts</p> <p>Ability to apply knowledge in the area of Accounting to develop and integrate the results of economic-financial communication in business decision models</p> <p>Ability to apply knowledge in the area of Accounting for the design and management of corporate restructuring and other extraordinary transactions</p> <p>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</p> <p>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</p> <p>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</p> <p>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</p> <p>Making judgements:</p> <p>Ability to apply acquired knowledge to make managerial and operational decisions and to solve problems in the administration and finance of companies, intermediaries and financial markets, jointly taking into consideration multiple perspectives of analysis, from economic to legal, financial, strategic, managerial</p> <p>Ability to select data and use appropriate information to describe a problem concerning the management of companies, intermediaries</p>
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	<p>and financial markets.</p> <p>Ability to relate models and empirical evidence in the study of companies, intermediaries and financial markets.</p> <p>Communication skills:</p> <p>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</p> <p>Learning skills:</p> <p>a) ability to use information technology autonomously to carry out bibliographic research and investigations and for one's own training and updating</p> <p>b) ability to identify thematic links and establish relationships between different cases and contexts of analysis</p> <p>c) ability to frame a new problem systematically and to generate appropriate taxonomies</p> <p>d) ability to develop general models from the phenomena studied.</p>
Specific Educational Objectives and Learning Outcomes (additional info.)	to introduce students to the CFA Exam.
Assessment	<p>Coursework on ethical aspects of investment industry.</p> <p>Closed-book exam on selected topics from CFA Exam.</p>
Evaluation Criteria	<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>
Required Readings	CFA Exam Level I Curriculum.
Supplementary Readings	No
Further Information	No
Sustainable Development Goals (SDGs)	Responsible consumption and production, Industry, innovation and infrastructure