

## Investment Research Challenge Components

- **Analysis** of a Public Company
- **Mentoring** by an Experienced Professional
- **Writing** a Research Report
- **Research Presentation** to Panel of High-Profile Industry Experts and Leaders
- **Opportunity for Advancement** to the CFA Institute Regional and Global Investment Research Challenges

## Important Dates

- 12 April 2008**  
Asia Pacific Region Investment Research Challenge  
Regal Hotel, Hong Kong
- 17 April 2008**  
European Region Investment Research Challenge  
Reuters Europe—London's Canary Wharf  
(16 April 2008—CFA UK Local)
- 30 April 2008**  
North American Investment Research Challenge  
Reuters America—Times Square, NYC
- 1 May 2008**  
Global Investment Research Challenge  
Reuters North America—Times Square, NYC

300+ students from over 80 universities in Asia, Europe, and North America will compete, including students from these schools ranked among the *Financial Times* top MBA programmes:

### Rank Business School - Full Time Graduate MBA Programme

2	London Business School
3	Columbia Business School
7	MIT Sloan School of Management
8	IE Business School (Spain) □
13	NYU Stern School of Business
20	Indian School of Business
21	ESADE (Spain) □
33	University of Virginia Darden School of Business
35	Imperial College London's Tanaka Business School
□1	Shanghai Jiao Tong University
□8	Carnegie Mellon Tepper School of Business
□8	SDA Bocconi (Italy) □
□1	Texas A&M Mays Business School
□□	Rice University Jones School of Management
71	Boston College Carroll School of Management
71	William and Mary Mason School of Business
7□	University of Texas McCombs School of Business
8□	Babson College
8□	Boston University School of Management
93	University of Pittsburgh Katz School of Business

## Purpose

The CFA Institute Global Investment Research Challenge offers students the unique opportunity to learn from leading industry experts and compete with peers from the world's top business schools. This annual educational initiative is designed to promote best practices in equity research among the next generation of analysts through hands-on mentoring and intensive training in company analysis and presentation skills.

## How it works

Society leaders together with local universities assemble university teams of 3-5 students each. Teams are mentored by industry professionals in writing an equity research report on a publicly traded company. The teams then present their findings to a distinguished panel of experts.

## Sponsors

- Show active promotion of industry best practices, professional excellence, and the highest ethical standards.
- Gain exposure and brand recognition....worldwide.
- Global Sponsor:



## Benefits of Participation

- **Universities:** Showcase your business school on a global scale; Provide students with practical training and exposure to top industry professionals
- **Mentors and Panelists:** Promote best practices in research to the next generation; Give back to the investment profession in a high-impact, time compressed manner.

## Local, Regional and Global Investment Research Challenge Dates

### New York Region IRC: 9 April 2008

New York Society 9 April 2008

### Asia Pacific Region IRC: 12 April 2008

Hong Kong Society 24 November 2007  
 India Society 29 March 2008  
 Indonesia Society 11 September 2007  
 Singapore Society 10 December 2007

### European Region IRC: 17 April 2008

French Society\* 22 May 2008  
 Italian Society April 2008  
 Netherlands Society\* 11 June 2008  
 UK Society 16 April 2008  
 Spanish Society Mid March 2008

### North America Region IRC: 30 April 2008

Atlantic Canada Society 3 November 2007  
 Boston Society 26 February 2008  
 Louisville Society 1 April 2008  
 Pittsburgh Society 24 October 2007  
 Texas Societies:  
 Dallas/FW & Houston 19 April 2008  
 Virginia Society 10 April 2008  
 Toledo Society\* April 2008

\* *local challenge only*