

Course Overview:

The CFA Program Overview is a 5-day intensive course tailored for finance professionals and aspiring CFA candidates who seek a foundational understanding of the Chartered Financial Analyst curriculum. While not a substitute for full exam preparation, it offers a strategic preview of the core domains, helping participants assess their readiness and interest in pursuing the prestigious CFA designation.

Course Objective:

- Understand the structure, format, and requirements of the CFA program
- Interpret and analyze key financial statements and ratios
- Apply quantitative methods to support financial decision-making
- Grasp fundamental economic principles and their investment implications
- Develop initial strategies for investment management and portfolio allocation

Course Outline:**Module 1: Introduction to the CFA Program**

- CFA designation value and global recognition
- Overview of exam levels and curriculum
- CFA Institute Code of Ethics and Standards

Module 2: Financial Reporting and Analysis

- Core components of financial statements
- Financial ratio analysis
- Basics of corporate finance and valuation

Module 3: Investment Management

- Principles of portfolio management
- Equity and fixed-income investment fundamentals
- Introduction to alternative investments

Module 4: Quantitative Methods

- Key statistical concepts for finance
- Time value of money and discounting
- Regression and hypothesis testing

Module 5: Economic Principles for Investment

- Micro and macroeconomic frameworks
- Market structures and fiscal/monetary policy
- Global economic indicators and trends

Module 6: Financial Markets Overview

- Structure of financial markets
- Roles of financial intermediaries
- Market efficiency concepts

Module 7: Ethics and Professional Standards

- Importance of ethics in financial services
- Application of the CFA Code and Standards
- Case studies on ethical dilemmas

Module 8: Practice Problems and Mock Exams

- Sample CFA-style questions
- Real-time practice sessions

Training Language:

EN

Training Methodology:

The course combines various teaching methods, including instructor-led presentations, group discussions, case study analyses, and assessments through quizzes and a final exam to engage participants and ensure they understand and retain the material.

Venue | Date | Fees

Riyadh | 16-11-2025 | 17,250 SAR

-Analysis of correct and incorrect responses

Module 9: Review of Key Concepts

-Consolidation of main course topics

-Peer-to-peer knowledge checks

-Review of common CFA challenges

Module 10: Exam Preparation and Strategies

-Time management techniques

-Test-taking tips and tools

-Q&A with CFA charterholders

Who Should Attend:

-Aspiring CFA Candidates

-Investment Analysts

-Financial Advisors

-Portfolio Managers