كلّية إدارة الأعمال
College of Business

جامعة الفيصل
Alfaisal University

The Chartered Financial Analyst Exam Preparation Program (CFA Level 1)

Program Summary

The CFA Level 1 program is designed to prepare candidates for the CFA Level 1 exam, providing comprehensive knowledge in financial analysis, investment management, and ethical standards. This program covers essential topics, equipping participants with the skills required to excel in the financial industry. Our expert instructors will guide you through the curriculum, ensuring a solid foundation for success in the CFA certification journey.

Objectives:

- Develop a thorough understanding of core finance and investment principles.
- Master financial reporting, quantitative methods, and corporate finance.
- Gain proficiency in portfolio management, asset valuation, and ethics.
- Prepare for the CFA Level 1 exam with confidence and competence.

Program Outline:

- **Ethics:**
This section covers the CFA Institute's code of ethics and standards of professional conduct, emphasizing integrity, transparency, and responsibility in financial decision-making.

- **Quantitative Methods:**
Learn essential statistical and mathematical tools used in finance, including probability theory, hypothesis testing, and time value of money.

- **Fixed Income:**
Learn about fixed income securities, bond pricing, interest rate risk, and credit risk analysis.

- **Equity:**
Examine the fundamentals of equity markets, stock valuation, and portfolio strategies focused on maximizing returns in equity investments.

- **Financial Statement Analysis:**
Understand how to interpret financial statements and evaluate the performance of companies using key accounting and reporting principles.

- **Portfolio Management:**
Develop skills in constructing investment portfolios, managing risk, and achieving client-specific financial goals through strategic wealth planning.

- **Alternative Investments:**
Study non-traditional asset classes such as real estate, private equity, and hedge funds, focusing on their roles in portfolio diversification.

- **Economics:**
Explore microeconomic and macroeconomic principles, including market dynamics, monetary policy, and international trade.

- **Corporate Issues – Corporate Structures and Ownership:**
Gain insights into corporate governance, capital budgeting, cost of capital, and financial risk management within companies.

- **Derivatives:**
Explore financial derivatives such as options, futures, and swaps, and their applications in risk management and speculative strategies.

Profiles of the Facilitators

Mr. Umair Khalid CFA, Managing Director

With 10+ years of experience in the field of investment banking, corporate finance, risk management, financial advisory, and research, Umair brings with him a diversified set of skills. His previous work experience includes serving as a Senior Advisor at KPMG as well as multiple Saudi venture capital and investment banking firms. He also serves as an Investment Committee member and an Advisory Board member for various entities. Further, he is also an instructor for CFA Program, an author of several published research papers and a seasoned corporate trainer.

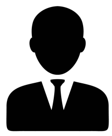
Sara Abo-Moati, CFA

An Investment Professional. Experienced in the field of Asset Management with
more focus on Equity Research in the MENA region. Sara is a CFA Charter holder.

Mr. Ghanem Al Ghanem CFA

Mr. Ghanem is an investment professional focused on developing and implementing asset allocation and investment strategies for institutions and high net-worth investors. In addition, Ghanem is an adjunct Financial Modeling and CFA instructor covering diverse topics of expertise including (Equity, Fixed Income, Alternative Investments, Quantitative Methods, Economics, and Portfolio Management). Mr. Ghanem holds two master's degrees from Drexel University, an MBA, & master's in finance, has an Advanced Certificate in Portfolio Management from New York University, Financial Risk Manager Certification, and is a Chartered Financial Analyst.

Adel Almomen PhD. CFA, FRM



Dr. Adel is a financial consultant and advisor. He is an assistant professor of finance at Prince Sultan University and an assistant professor of finance and investment at Al-Imam Muhammad Ibn Saud Islamic University. Dr. Almomen holds a PhD in finance from the University of North Texas. He is a Chartered Financial Analyst (CFA) charterholder and a Certified Financial Risk Manager (FRM). Dr. Adel serves as the chair of the audit committee at Tharwat for Financial Securities and is a member of the board of directors at the Association for Social Economics. He also serves as an audit committee member at Telad Investments.

Fees: 15000 SAR

Contact & Venue

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