



Report Graders - University Research Challenge

| | |
|------------------------------------|---|
| No of new member volunteers | 4 |
| Timeframe | Membership year 2018/19 |
| Commitment | 2 weekends or equivalent – February 2019 |
| Reports to: | Staffed Office |

We are looking for volunteers with experience in equity analysis and research to grade the student reports submitted by UK universities for the Research Challenge. The CFA Research Challenge provides university students with hands on mentoring and extensive training in financial analysis. University students across UK work in a team of 5 students to research and analyse a publicly traded company. Each team writes a research report on their assigned company with a buy, sell, or hold recommendation. The best reports are selected for the local final, and are asked to present and defend their analysis to a panel of industry professionals. Winners then go through to regional final, hosted by CFA Institute, 10-11 April 2019, taking place in Switzerland.

Purpose and activities:

- As Grader, you will help provide students real world experience in submitting a research report. You will introduce them to best practices in research techniques and ethics in investments to form the way they practice in the field during the course of their careers.
- The Report Graders review reports and score them according to a predetermined point system. The best teams may advance to present their research to a panel of experts. Report Graders should provide as much feedback as possible for the teams.

Who are we looking for?

- Report Graders should be CFA Charterholders with 3-5 years of experience preparing equity research with a strong understanding of the financial markets and investment process.
- Report Graders should have a strong analytical ability.
- Experience publishing research is a plus. It is not necessary to have experience in a specific sector.
- Report Graders should have command of the English language.
- Attendance of Kick off Meeting (via webinar or in person – tbc) However, all guidance is available through the rules book and local level manual, so not essential.
- Availability for two weekends or equivalent (within same time frame) in February 2019
- Someone who will be an influential mentor with the ability to connect with the students, and ensure their reports are the best they can be.

Commitment

- Expect to spend approximately two hours grading each report and providing feedback. Graders typically grade between four and eight reports each.
- Attending the local final (optional)

How CFA UK will help:

CFA UK will code and anonymise the reports ready, and be available for any guidance. We will provide you with a marking and scoresheet, along with the rules of the challenge.

What you will gain:

- Build your profile within the CFA UK network of volunteers, the wider membership and the industry.



- Opportunity to attend the regional final in Switzerland
- Volunteering brings a “shared experience” amongst peers that has long lasting benefits for your career.
- Attendance to CFA Research Challenge event, network and meet volunteers, students and finance faculty managers.

If you are interested in applying for this opportunity, please download the Volunteer Application form and return it along with a copy of your CV to volunteer@cfauk.org

Deadline for applications: 31 October 2018