

CFA space

Provided by APF

Academy of Professional Finance 专业金融学院

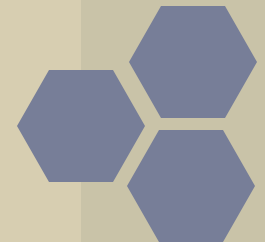


CFA Level I

Alternative Investments

Introduction

CFA Lecturer: Jiahao Gu

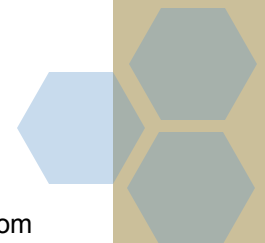




Weight of Quantitative Methods

Topic Area	Level I	Level II	Level III
Ethical and Professional Standards	15	10-15	10-15
Quantitative Methods	12	5-10	0
Economics for Valuation	10	5-10	5-15
Financial Reporting and Analysis	20	15-20	0
Corporate Finance	7	5-15	0
Equity Investments	10	15-25	5-15
Fixed Income	10	10-20	10-20
Derivatives	5	5-15	5-15
Alternative Investments	4	5-10	5-15
Portfolio Management	7	5-10	40-55
Total	100	100	100

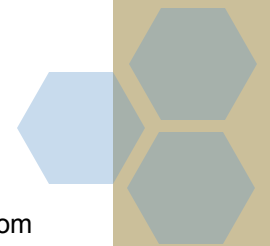
Data Source: CFAInstitute.org





Overview

Readings	LOS
Introduction to Alternative Investments	7





Overview of LOS

Introduction to Alternative Investments

1. Compare alternative investments with traditional investments
2. Describe categories of alternative investments
3. Describe potential benefits of alternative investments in the context of portfolio management
4. Describe hedge funds, private equity, real estate, commodities, infrastructure, and other alternative investments, including, as applicable, strategies, subcategories, potential benefits and risk, fee structures, and due diligence
5. describe, calculate, and interpret management and incentive fees and net-of-fees returns to hedge funds
6. Describe issues in valuing and calculating returns on hedge funds, private equity, real estate, commodities, and infrastructure
7. Describe risk management and alternative investments

CFAspace



Thank You!

