



FINNACLE INSTITUTE

20TH
YEAR OF OPERATION
(SINCE 2003)

BIGGEST
FINANCE
ACADEMY OF INDIA

19,000+
STUDENTS TRAINED
FULL TIME

Training
Programmes

- 1) Basic CFA (USA) Exam prep**
- 2) Advanced CFA (USA) Training Program (FinBridge)**

**India's Biggest Academy of
Finance Professional Courses**

CFA (USA)

[World's most recognised Investment Program]

Introduction

The Chartered Financial Analyst® charter is a professional designation recognized as the most respected investment management designation globally.

CFA certification is issued by CFA Institute, USA. CFA is a 75 year old certification, acceptable for Finance Careers in more than 170+ countries.

In CFA, there are three levels: Level 1, level 2, and level 3. You need to clear each level sequentially and have three years of work experience in the finance field to become a CFA.

When can I appear for CFA (Eligibility)?

Level 1

After 1st Year of College

Level 2

After 2nd Year of College

Level 3

After Graduation Result

CFA (USA)

[World's most recognised Investment Program]

Duration & Curriculum

You require a minimum of 3 years to clear all three levels of CFA exams.

Topic	Structure	Level 1	Level 2	Level 3
Ethical & Professional Standards	Ethical rules for Governance of the Financial Institute while dealing with various persons	15 - 20%	10 - 15%	10 - 15%
Quantitative Methods	Application of Statistical tools in financial analysis	8 - 10%	5 - 10%	-
Economics	Applied economics for Financial Decision Making	8 - 10%	5 - 10%	5 - 10%
Financial Statement Analysis	Reporting Standard & Accounting Analysis	13 - 17%	10 - 15%	-
Corporate Finance	Tools for the Financial Management of a Company	8 - 10%	5 - 10%	-
Equity Investments	Analysis & Valuation of Shares & similar Securities	10 - 12%	10 - 15%	10 - 15%
Fixed Income	Analysis & Valuation of Bonds & similar Securities	10 - 12%	10 - 15%	10 - 15%
Derivatives	Analysis & Valuation of Derivative Instruments	5 - 8%	5 - 10%	5 - 10%
Alternative Investments	Analysis & Valuation of Mutual Fund, PE Fund, VC Fund, Commodity & other investments	5 - 8%	5 - 10%	5 - 10%
Portfolio Management	Portfolio Management theories & their Application	5 - 8%	5 - 15%	35 - 40%

CFA (USA)

[World's most recognised Investment Program]

Exam Pattern, Attempts & Fees

CFA Levels	Level 1	Level 2	Level 3
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What is the CFA Exam pattern?

Number of Exams	2 exams in a single day	2 exams in a single day	2 exams in a single day
Time Duration	2.25 Hours per Exam	2.25 Hours per Exam	2.25 Hours per Exam
Number of Questions	90 MCQ's Per Exam	44 MCQ's Per Exam	11 Vignette Per Exam
Question Type	MCQ's	Vignette Based MCQ's	Vignette Based MCQs & Essay
Marking System (no negative marking)	Approx. 70% to Clear	Approx. 70% to Clear	Approx. 50% to Clear

When are the CFA Exam Attempts?

February	✓		✓
May	✓	✓	
August	✓	✓	✓
November	✓	✓	

What are the investments required to appear for CFA Exams?

One Time Enrollment Fee	\$350	Not Applicable	Not Applicable
Early Registration Fee	\$940	\$940	\$940
Standard Registration Fee	\$1250	\$1250	\$1250

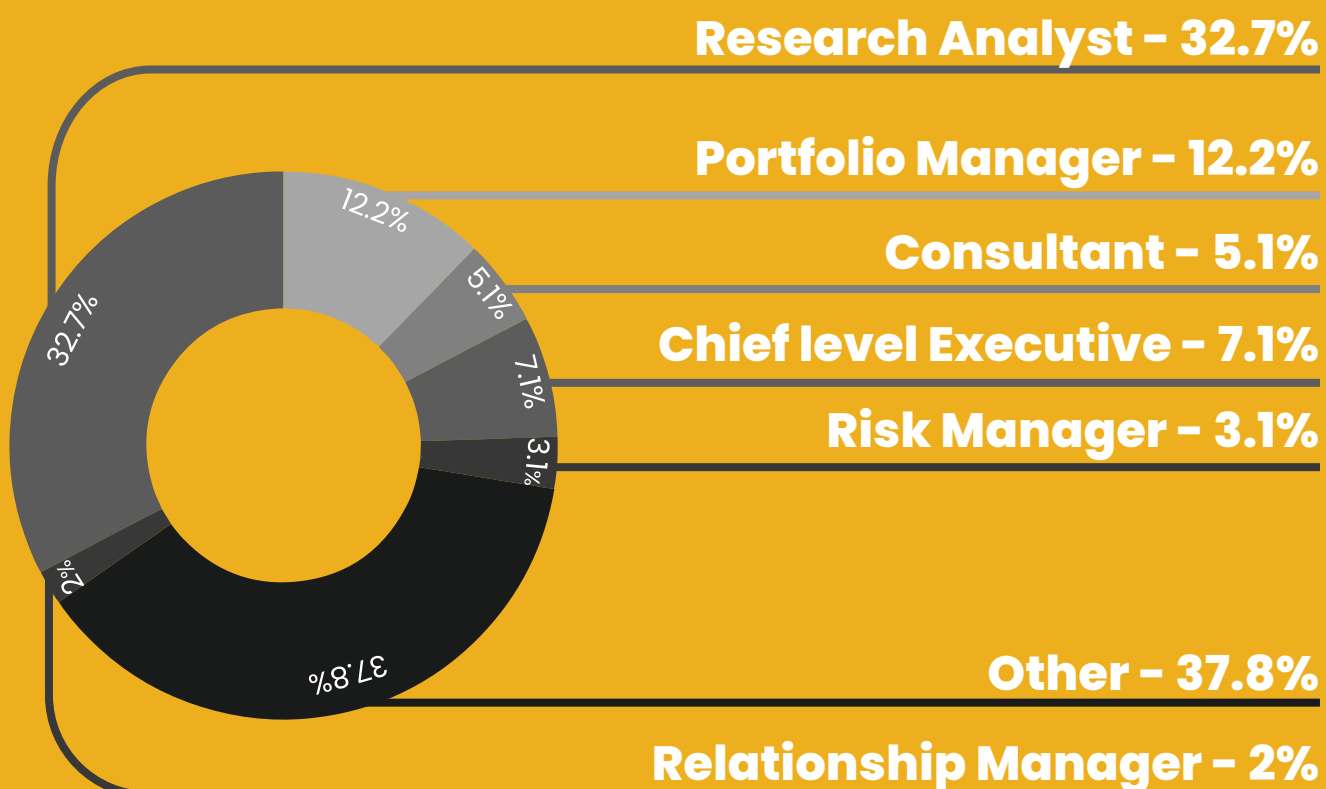
CFA (USA)

[World's most recognised Investment Program]

Registration Deadline & Career Prospects

Exam Attempt	Early Registration \$900	Standard Registration \$1200	Registration Deadline
February	1st Week of August	1st Week of November	
May	1st Week of November	1st Week of February	
August	1st Week of February	1st Week of May	
November	1st Week of May	1st Week of August	

What are CFA's
Career and
Job Prospects?

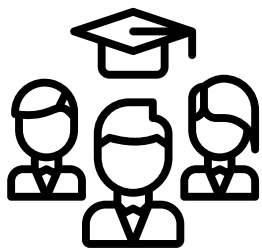


CFA (USA)

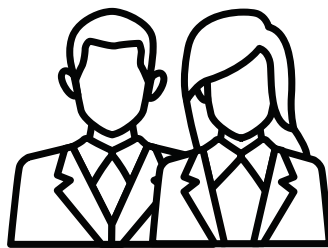
[World's most recognised Investment Program]

Finnacle Institute Track Record in CFA Training

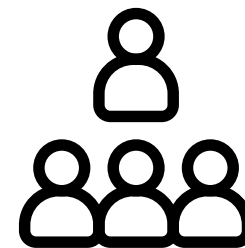
Finnacle Institute (Earlier called as Laukik Shah Classes) brings with itself a legacy in CFA Coaching and CFA Program training, with the most experienced CFA trainer in India Mr. Laukik Shah – training for CFA since 2003.



18000+
Students



19+ Years
Experience

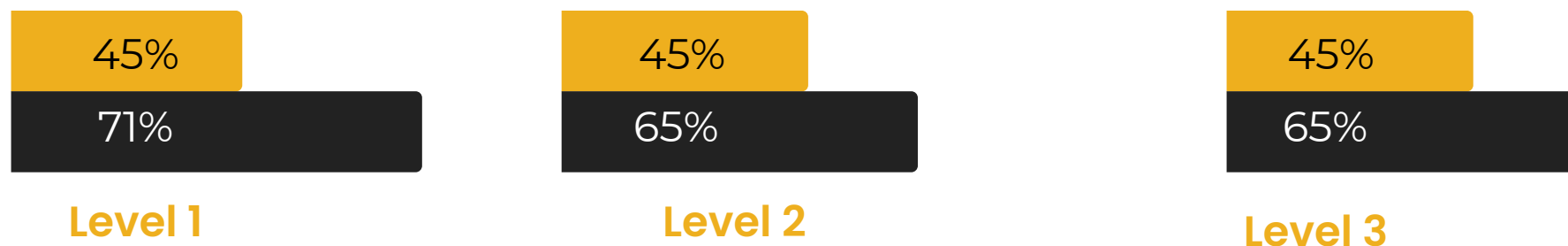


150+
Batches

What are the passing rates for CFA?

■ CFA Institute

■ Finnacle Institute



200+ candidates in world's **Top 10 Percentile**
in last 2 Years Highest number by any CFA
training institute of India

CFA (USA)

[World's most recognised Investment Program]

How Does Finnacle Institute Train for CFA Exams?

We train for CFA Exam in 2 ways:

- Basic **CFA Exam Prep Program**
- Advanced **CFA Training Program (Finbridge Program)**
 - For Guaranteed Placement into Core Finance

Basic CFA Exam Prep Program

Key Features – What Finnacle Provides!

The main focus of this program is on training the candidates in the best possible way and teaching them the concepts of the entire curriculum of the CFA exam. Here efforts by trainers are provided in the direction of exam perspective. We offer the following in this pathway:



Notes and important concepts
Short Notes for quicker revisions



Subject-wise tests, doubt sessions
and Revision series



250+ Hours of Class Training per
level with Weekday/weekend
options



Question Practice - 3 tests per
chapter, 2 tests per subject & 4 full
length mock test



Classroom & Live Webinar options



Experienced Faculty: Oldest CFA
faculty of India, CAs, CFAs, FRMs



Dedicated Mobile and Desktop
app for recorded videos



Detailed preparation schedule
offered for focused study



Placement Assistance

Basic CFA Exam Prep Program

Schedule & Fees

LOCATION

DAYS

TIME

Andheri
Weekend

SUNDAY
ALTERNATE SATURDAY
(2nd & 4TH SATURDAY)

5:00 PM – 9:00 PM
5:00 PM – 9:00 PM

Andheri
Weekday

MONDAY, TUESDAY & WEDNESDAY
EXTRA LECTURE ON THURSDAY

6:30 PM – 9:00 PM

Dadar
Weekend

SUNDAY
ALTERNATE SATURDAY (2nd & 4TH SATURDAY)

8:00 AM – 12:00 PM
8:00 AM – 12:00 PM

Grant Road
Weekday

TUESDAY, WEDNESDAY & THURSDAY
EXTRA LECTURE ON MONDAY

2:45 PM – 5:15 PM

SURAT

MONDAY TO FRIDAY
(CLASSROOM & LIVE WEBINAR)

6:30 PM – 9:00 PM

*ALL BATCHES AVAILABLE IN ONLINE AS WELL AS OFFLINE MODE
*NEW BATCHES LAUNCH EVERY MONTH. PLEASE CALL TO KNOW THE SCHEDULE

CFA Advanced Training Program (FinBridge)

GUARANTEED PLACEMENT INTO CORE FINANCE

Advanced CFA Training Program

Introduction

CFA Advanced Training Program (FinBridge)

GUARANTEED PLACEMENT INTO CORE FINANCE

90%

OF CFA CANDIDATES STRUGGLE WITH

Clearing CFA Levels in One Shot

Getting respectable Salaries as freshers

Cracking dream careers after CFA like

**Investment Banking | Private Equity |
Venture Capital | Portfolio Management**

CFA Advanced Training Program (FinBridge)

WITH GUARANTEED PLACEMENT INTO CORE FINANCE

**Our Advanced CFA Training Program
(FinBridge)**

With Guaranteed Placements

Eliminates these pain points &

**Gives a Headstart to
Beat the Competition**

CFA Advanced Training Program (FinBridge) WITH GUARANTEED PLACEMENT INTO CORE FINANCE

CFA Advanced Training Program has 3 stages

Stage 1

CFA Training

All 10 subject L1 Exam training including:

- Chapter test
- Subject test
- Doubt solving
- Mock test
- Physical Mode & Live webinar, both available.

Evaluation for CFA L1 training will be conducted by CFA Institute.

Advance Skill Set Training (Practical Knowledge)

- Financial & Forensic Analysis
- Company Analysis
- Valuations & Financial Modelling
- Investment Banking and Venture Capital
- Reading Club and Current Awareness Club
- Tech Edge
- Guest Sessions

** All Modules taught with 200+ Real Indian Business Case Studies.

** Project Work Based Evaluation on Indian Companies.

Evaluation for advanced skill set module will be done by Finnacle Institute Evaluation Committee composed of Industry Analyst & Associates.

You need to score 60% in these Projects to be eligible for Campus Placements.

CFA Advanced Training Program (FinBridge)

WITH GUARANTEED PLACEMENT INTO CORE FINANCE

Stage 1

Let us understand the modules covered in Advance Skill Set Training of Stage 1 along with CFA(US) Training)

Financial Analysis & Forensic Accounting

100+ Indian company case studies help teach how to conduct a line-by-line analysis of all footnotes, standalone & consolidated financial statements, Critical sections of annual reports (AOC forms, MGT sections, Auditor's report, etc). All the Indian Accounting standards and the relevant portion of Companies Act 2013, detect accounting frauds & corporate governance issues, adjust financial ratios as per accounting adjustments, analyze financial numbers to take investment decisions about a company, prepare a Financial Analysis checklist & excel templates used in Equity Research & Investment Banking.

Business & Company Analysis

50+ case studies are used to make a student learn: How to analyze Revenue drivers, Cost Drivers, Return matrix, Value chains, Industry segmentation, Business Model of a company, Risk of a business, competitive advantage, Industry competition, primary/on-ground research of a company (meeting suppliers, buyers, competitors etc), management strategies, Fund Flow, sourcing of data. Learn how to prepare an in-depth research report on a company, forecast financial statements of a company & Generate Investment Ideas.

Sector Consulting & Analysis

Complex sectors like IT, real estate, Pharma, Cement, Banking etc are taught to students here. Various aspects of these sectors like analyzing business models, Value chains, technical jargons, complex financial statements, Revenue Drivers & Cost Drivers, extracting relevant data from primary & secondary sources, and valuation methods are covered in detail.

CFA Advanced Training Program (FinBridge)

WITH GUARANTEED PLACEMENT INTO CORE FINANCE

Stage 1

Business & Sector Valuations and Financial Modelling

Prepare a full-fledged financial model for any type of company – Small-Cap, mid-cap & Large-Cap, start-Ups, Merger & Acquisition, Valuing brands, ESOPs model, etc. Build a financial model from scratch by interconnecting P&L, Balance Sheet, Cash Flow Statement, and Footnotes through complex formulas, Schedules, and Assumption sheets based on logical thought processes. Conduct DCF Valuation, Relative Valuation, Beta calculations, waterfall charts, single & double sensitivity analysis, and scenarios analysis. Also learn Unique Valuations methods like Replacement Cost, SOTP, Conglomerate discounts, Holding Company Valuations, Commodity Business Valuations, and cross-holding valuations. Also, real case studies published by legends of valuations like Aswath Damodaran & Michael Mauboussin are taught to students.

Mastering Investment Banking & Venture Capital

Analyze critical operating metrics used to analyze a start-up, Prepare valuation model of a start-up, e-commerce and SaaS (Software), Company Prepare Investment Memorandum, Business Plan, Financial Plan, analyze Pitch Deck, Analyze Term Sheets, Case studies to understand the impact of TAM, Churn Rate, Burn Rate, CAC, high Re-investment rates, GMVs, Net Promoter Score on valuations of a start-up.

Guest Sessions by Top CIO's of Finance Industry

Learn from Stalwart Series



Episode 1
Mr. Kenneth Andrade
CIO - Old Bridge Capital

[Click Here](#)

Learn from Stalwart Series



Episode 4
Mr. Maran Govindasamy
Unifi Capital

[Click Here](#)

Learn from Stalwart Series



Episode 6
Prof. Sanjay Bakshi
Adjunct Professor - Finance & Renowned Value Investor

[Click Here](#)

Learn from Stalwart Series



Episode 14
Ravi Dharamshi
Chief Investment Officer
Value Quest Investment Advisers

[Click Here](#)

and many more!!

CFA Advanced Training Program (FinBridge)

WITH GUARANTEED PLACEMENT INTO CORE FINANCE

Stage 1



Learn Practical Application of CFA Concepts in Indian Markets with **100+** Live Indian case studies and Research & Valuation Project Works on the above Modules



Our Historical Passing Rate for CFA candidates who pursued CFA through our Advanced CFA Training



85%

CFA Advanced Training Program (FinBridge)

WITH GUARANTEED PLACEMENT INTO CORE FINANCE

Stage 2 - Campus Placement

 **Campus Placement right after Level 1**

 **Guaranteed Full-Time Campus Placements from Finnacle Institute in highest paying Premium Profiles of Finance**

EQUITY
RESEARCH
[ER]

VENTURE
CAPITAL
[VC]

PORTFOLIO
MANAGEMENT
[PMS]

INVESTMENT
BANKING
[IB]

PRIVATE
EQUITY
[PE]

 **Campus Placement Packages**

₹ 8 Lakhs

Minimum Package

₹ 14 Lakhs

Highest Package

 **Finnacle manages the entire process of Campus Placements(Mock interviews, Resume prep, Salary negotiation & Co-ordinating with recruiter**

CFA Advanced Training Program (FinBridge) WITH GUARANTEED PLACEMENT INTO CORE FINANCE

Stage 2 - Campus Placement



70+ Campus Recruiters

INCLUDING SOME OF INDIA'S TOP FINANCE COMPANIES



Felix Advisory
Innovating financial solutions



Undergraduate level CFA candidates can become the Youngest Analyst at **19-20** in India and obtain early **CFA charter**



Even if candidate decides to not appear for CFA L1 or fail CFA L1 but Clear Advance Skill-Set Project they would be eligible for placement at the same Guaranteed Package into the same Premium Profiles.

CFA Advanced Training Program (FinBridge) WITH GUARANTEED PLACEMENT INTO CORE FINANCE

Stage 2 - Campus Placement

RECRUITER TESTIMONIALS

Amit Kumar

Head Deal Origination & HR

I wish to take this opportunity to convey my appreciation for the quality human resources your institute is churning out. At the tender age of 20, they have a clear understanding of financial concepts and have a very structured approach to solving a problem. We wish to hire many more interns from your institution in future! Keep up the good work!



HK Sudhindra

Partner | Blue Banyan

We at Blue Banyan have recruited a candidate from Finnacle and it's no exaggeration to say he has far exceeded our expectations. I have personally taught at some well known B-Schools and it is clear that the Finnacle course content is far better suited to the needs of capital markets players than what's taught elsewhere.

Vinit Rai

Executive Director, Private Equity | JM Financial

The candidate has been assisting the team in investment opportunity screening and detailed evaluation and she has done a fantastic job so far!! She has helped a lot by taking initiative and doing primary market research and supplementing it by competitive profiling of the space.. All in all, your institute is doing a terrific job!!



CFA Advanced Training Program (FinBridge)

WITH GUARANTEED PLACEMENT INTO CORE FINANCE

Stage 3

CFA Training

L2 Prep & L3 Prep on weekends.

All 10 subject L1 Exam training including:

- Chapter test
- Subject test
- Doubt solving
- Mock test
- Physical Mode & Live webinar, both available.

Full-Time Role

- Candidates continue working in full-time roles. For Undergraduate candidates companies will give relevant breaks for college exam & from CFA exams also.
- Apply for CFA Charters as soon as 3 year working & CFA L3 is complete.

Key Difference between

Basic CFA Exam Prep & Advanced CFA Training Program

Basic CFA Exam Prep Program	Advanced CFA Training Program
Study Theory of Financial concepts	Study Theory of financial concepts and obtain complete practical knowledge through application on 100 + real Indian business case studies
Minimum time required to clear all CFA – 2.5 years	Minimum time required to clear all CFA – 3 years
CFA charter which is the ambition for all CFA students is delayed as you need 3 years work experience for charter	The CFA charter is fast-tracked as you start working in parallel to your CFA exams after clearing Advanced CFA Training Program
Usually CFA candidates, get placed in operational roles and data analysis roles	A FinBridge passout gets placed in premium profiles like IB,PE,VC, ER in roles like research associate, research analyst, Valuation Analyst etc
Avg Packages for CFA L3 cleared Fresher – 7-9 Lakhs per annum	FinBridge Program graduates are offered packages between 7-14 Lakhs per annum plus bonus even before CFA LI
No Campus placement services	Guaranteed Campus Placement on clearance of Advanced CFA Training Program
Application for MBA becomes easy as CFA has affiliation with 600+ MBA colleges	Application becomes 10 times smoother with CFA + work experience in top profiles + Practical knowledge of core finance

CFA Advanced Training Program (FinBridge)

WITH GUARANTEED PLACEMENT INTO CORE FINANCE

Schedule

Location	Days	Time
Andheri	Tuesday, Wednesday & Thursday	4:00 - 6:00
	Friday & Saturday	6:30 - 8:30
Grant Road	Tuesday, Wednesday & Thursday	6:30 - 8:30
	Friday & Saturday	6:30 - 8:30
Surat	Tuesday, Wednesday & Thursday	4:00 - 6:00
	Friday & Saturday	6:30 - 8:30

Scholarships

Scholarship Offered by CFA Institute for CFA Exams

CFA Scholarship by CFA Institute

Access Scholarship

For individuals who may not be able to afford the program fees. Applicants must meet all CFA Program enrollment requirements. Exam registration reduced to USD250

Women's Scholarship

For women who are interested in earning the CFA charter, do not qualify for other CFA Institute scholarships, and have not yet registered for their next exam. Exam registration reduced to USD350

Scholarship Offered by Finnacle Institute for Advanced CFA Training Program

Super 10 Scholarship – For Financially Challenged

Students 100% Scholarship & placement guarantee upon clearance of the program.
10 Students will be selected based on 10th / 11th-grade marks, written tests & personal interviews

Finance Vidya Scholarship sponsored by H.T. Kanabar Higher Education Trust.

The Trust will pay 100% fees of the Program for students selected for this scholarship. Girls with strong academic performance in their school (11th & 12th) and/or college 1st/2nd year but are facing financial troubles can apply.



We, at Finnacle Institute, provide complete step-by-step assistance of the complete process for all the Scholarships.

Contact Us



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[@finnacle.institute](https://www.instagram.com/finnacle.institute)



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[@finnacleinstitute](https://www.linkedin.com/company/finnacleinstitute)



Finnacle Institute - Mumbai

NADCO, Vivina - 2b/13, 2nd Floor, opp Railway Station, Andheri West, Mumbai - 400058

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(All branches within walking Distance from station)

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