

CFA LEVEL-III JUNE - 2016 EXAM

STUDY SCHEDULE BATCH IV

Teacher:	Syed Ali Haider	(ali@azfinancials.com)					
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Exam Date: 4-Jun-16	Total Number of Study Sessions: 18						
Morning Session: 8-13 Essay Type Sets (3 Hours)	Total Number of Readings: 32						
Evening Session: 10 Item Sets (3 Hours)	Total Time Available (Till Exam): 265 Days (39 Weeks)						
Topic Area Weights for the CFA Exam							
TOPIC AREA	S.S. #	% Weight	Exp. % Weight	Expected Appearance	Min Hours		
Ethical and Professional Standards	1-2	10%-15%	10%	Item Set	80		
Portfolio Management – Behavioral Finance	3	5%-10%	5%	Essay Type OR Item Set	60		
Portfolio Management – Individual	4	10%-15%	10%	Essay Type	220		
Portfolio Management – Institutional	5	10%-15%	10%	Essay Type	160		
Economics	6-7	5%-15%	5%-10%	Essay Type OR Item Set	125		
Portfolio Management – Asset Allocation	8	5%-10%	5%	Essay Type	85		
Fixed Income	9-10	10%-20%	10-15%	Essay Type AND Item Set	160		
Equity Investments and Corporate Governance	11-12	5%-15%	10-15%	Essay Type AND Item Set	160		
Alternative Investments	13	5%-15%	5%	Essay Type OR Item Set	120		
Portfolio Management – Risk Management	14	5%-15%	5%	Essay Type OR Item Set	120		
Derivatives	15	5%-15%	5%	Item Set	120		
Portfolio Management – Monitor and Rebalance	16	5%-15%	5%	Essay Type	100		
Portfolio Management – Performance Evaluation	17	5%-15%	5%	Essay Type OR Item Set	120		
Global Investment Performance Standards	18	5%	5%	Item Set	120		
TOTAL					1750		
WEEKLY SCHEDULE							
WEEK	PARTICULARS	DATE / DAY	TIMING	Study Sessions	Readings	TOPIC(S)	
WEEK # 1	Lecture # 1	13-Sep-15 / Sun	11:30 am-04:00 pm	10	20	Fixed-Income Portfolio Management—Part I	
	Test # 1	20-Sep-15 / Sun	11:00 am-11:30 am	Reading Assignment # 20			
WEEK # 2	Lecture # 2	20-Sep-15 / Sun	11:30 am-04:00 pm	10	20	Fixed-Income Portfolio Management—Part I	
WEEK # 3	EID HOLIDAYS						
WEEK # 4	Lecture # 3	30-Sep-15 / Tue	07:30 pm-10:00 pm	10	20	Fixed-Income Portfolio Management—Part I	
	Lecture # 4	4-Oct-15 / Sun	11:30 am-04:00 pm	10-11	21	Relative-Value Methodologies for Global Credit Bond	
					22	Fixed-Income Portfolio Management—Part II	
	Test # 2	11-Oct-15 / Sun	11:00 am-11:50 pm	Reading Assignments # 20-21			
WEEK # 5	Lecture # 5	11-Oct-15 / Sun	12:00 pm-04:00 pm	11	22	Fixed-Income Portfolio Management—Part II	
	Practice Session	15-Oct-15 / Thu	07:00 pm-09:00 pm		Reading Assignment # 22		
	Test # 3	18-Oct-15 / Sun	11:00 am-11:50 pm		Reading Assignment # 22		
WEEK # 6	Lecture # 6	18-Oct-15 / Sun	12:00 pm-04:00 pm	12	23	Equity Portfolio Management	
	Test # 4	25-Oct-15 / Sun	11:00 am-11:50 pm	Reading Assignment # 23			
WEEK # 7	Lecture # 7	25-Oct-15 / Sun	12:00 pm-04:00 pm	12	23	Equity Portfolio Management	
	Practice Session	29-Oct-15 / Thu	07:00 pm-09:00 pm		Reading Assignment # 23		
WEEK # 8	Test # 5	6-Nov-15 / Fri	07:00 pm-10:00 pm	Fixed Income & Equity Investments			
WEEK # 9	Lecture # 8	8-Nov-15 / Sun	11:30 am-04:00 pm	13	24	Alternative Investments Portfolio Management	
	Test # 6	15-Nov-15 / Sun	11:00 am-11:50 pm	Reading Assignments # 24			

WEEK	PARTICULARS	DATE / DAY	TIMING	Study Sessions	Readings	TOPIC(S)
WEEK # 10	Lecture # 9	15-Nov-15 / Sun	12:00 pm-04:00 pm	13	24	Alternative Investments Portfolio Management
	Q & A Session	19-Nov-15 / Wed	07:00 pm-09:00 pm		Reading Assignments # 24	
	Test # 7	22-Nov-15 / Sun	11:00 am-11:50 pm		Reading Assignments # 24	
WEEK # 11	Lecture # 10	22-Nov-15 / Sun	12:00 pm-04:00 pm	14	25	Risk Management
	Test # 8	29-Nov-15 / Sun	11:00 am-11:50 pm	Reading Assignment # 25		
WEEK # 12	Lecture # 11	29-Nov-15 / Sun	12:00 pm-04:00 pm	14	25	Risk Management
	Practice Session	3-Dec-15 / Thu	07:00 pm-09:00 pm		Reading Assignment # 25	
	Test # 9	13-Dec-15 / Sun	11:00 am-11:50 pm		Reading Assignment # 25	
WEEK # 13	Lecture # 12	13-Dec-15 / Sun	12:00 pm-04:00 pm	15	26	Risk Management Applications of Forward and Futures
					28	Risk Management Applications of Swap Strategies
	Test # 10	20-Dec-15 / Sun	11:00 am-11:50 pm	Reading Assignments # 26 & 28		
WEEK # 14	Lecture # 13	20-Dec-15 / Sun	12:00 pm-04:00 pm	15	28	Risk Management Applications of Swap Strategies
					27	Risk Management Applications of Option Strategies
	Practice Session	25-Dec-15 / Thu	07:00 pm-09:00 pm	Reading Assignment # 27 & 28		
WEEK # 15	Test # 11	1-Jan-16 / Fri	07:00 pm-10:00 pm	Study Sessions # 13, 14 & 15 (Book # 4)		
WEEK # 16	Lecture # 14	3-Jan-16 / Sun	11:30 am-04:00 pm	16	29	Execution of Portfolio Decisions
					30	Monitoring & Rebalancing
	Test # 12	10-Jan-16 / Sun	11:00 am-11:50 pm	Reading Assignment # 29 & 30		
WEEK # 17	Lecture # 15	10-Jan-16 / Sun	12:00 pm-04:00 pm	16 & 17	30	Monitoring & Rebalancing
					31	Evaluating Portfolio Performance
	Test # 13	17-Jan-16 / Sun	11:00 am-11:50 pm	Reading Assignemnt # 30-31		
WEEK # 18	Lecture # 16	17-Jan-16 / Sun	12:00 pm-04:00 pm	17	31	Evaluating Portfolio Performance
	Practice Session	15-Jan-16 / Thu	07:00 pm-09:30 pm		Reading Assignment # 30 & 31	
	Test # 14	24-Jan-16 / Sun	07:00 pm-09:00 pm		Reading Assignment # 30 & 31	
WEEK # 19	Lecture # 17	24-Jan-16 / Sun	11:30 am-04:00 pm	3	5	The Behavioral Finance Perspective
					6	The Behavioral Biases of individuals
					7	Behavioral Finance & Investment Processes
WEEK # 20	Lecture # 18	31-Jan-16 / Sun	11:30 am-04:00 pm	3-4	6	The Behavioral Biases of individuals
	Practice Session	4-Feb-16 / Wed	07:00 pm-09:00 pm		8	Managing Individual Investor Portfolios
	Test # 15	7-Feb-16 / Sun	11:00 am-11:50 pm		Reading Assignment # 8	
WEEK # 21	Lecture # 19	7-Feb-16 / Sun	12:00 pm-04:00 pm	4	9	Taxes and Private Wealth Management in a Global Context
	Lecture # 20	10-Feb-16 / Wed	07:30 pm-10:30 pm		9	Taxes and Private Wealth Management in a Global Context
					10	Estate Planning in a Global Context
	Test # 16	14-Feb-16 / Sun	11:00 am-11:50 pm	Reading Assignments # 8, 9 & 10		
WEEK # 22	Lecture # 21	14-Feb-16 / Sun	12:00 pm-04:00 pm	5	11	Concentrated Single Asset Positions
					12	Lifetime Financial Advice: Human Capital, Asset Allocation,
	Test # 17	21-Feb-16 / Sun	11:00 am-11:50 pm	Reading Assignments # 8, 11 & 12		
WEEK # 23	Lecture # 22	21-Feb-16 / Sun	12:00 pm-04:00 pm	6	13	Managing Institutional Investor Portfolios
					14	Linking Pension Liabilities to Assets
	Practice Session	24-Feb-16 / Wed	07:30 pm-10:30 pm		Reading Assignment # 13 & 14	
	Test # 18	28-Feb-16 / Sun	11:00 am-11:50 pm	Reading Assignment # 13 & 14		
WEEK # 24	Lecture # 23	28-Feb-16 / Sun	12:00 pm-04:00 pm	8	17	Asset Allocation
	Test # 19	6-Mar-16 / Sun	11:00 am-11:50 pm	Reading Assignments # 9 & 17		

WEEK	PARTICULARS	DATE / DAY	TIMING	Study Sessions	Readings	TOPIC(S)
WEEK # 25	Lecture # 24	6-Mar-16 / Sun	12:00 pm-04:00 pm	8 & 9	17	Asset Allocation
					18	Currency Management
	Practice Session	9-Mar-16 / Thu	07:30 pm-10:30 pm		Reading Assignment # 17 & 18	
	Test # 20	13-Mar-16 / Sun	11:00 am-11:50 pm	Reading Assignments # 8, 17 & 18		
WEEK # 26	Lecture # 25	13-Mar-16 / Sun	12:00 pm-04:00 pm	7 & 9	19	Market Indexes and Benchmarks
					15	Capital Market Expectations
	Test # 21	20-Mar-16 / Sun	11:00 am-11:50 pm	Reading Assignments # 15 & 19		
WEEK # 27	Lecture # 26	20-Mar-16 / Sun	12:00 pm-04:00 pm	7	15	Capital Market Expectations
					16	Equity Market Valuation
	Test # 22	27-Mar-16 / Sun	11:00 am-11:50 pm	Study Session # 7		
WEEK # 28	Lecture # 27	27-Mar-16 / Sun	12:00 pm-04:00 pm	18	32	Global Investment Performance Standards
	Q & A Session	30-Mar-16 / Wed	07:30 pm-10:30 pm		32	Global Investment Performance Standards
		Test # 23	3-Apr-16 / Sun	11:00 am-11:50 pm	Reading Assignments # 32	
WEEK # 29	Lecture # 28	3-Apr-16 / Sun	12:00 pm-04:00 pm	1-2	1	Code of Ethics and Standards of Professional Conduct
					2	Guidance for Standards I-VII
					4	Asset Manager Code of Professional Conduct
WEEK # 31	Test # 24	17-Apr-16 / Sun	09:00 am-12:00 pm 01:00 pm-04:00 pm	Study Session # 1,2,3,4,5,6,7 & 8		
WEEK # 33	Test # 25	1-May-16 / Sun	09:00 am-12:00 pm 01:00 pm-04:00 pm	Study Session # 9,10,11,12,13,14,15,16,17 & 18		
WEEK # 35	Test # 26	14-May-16 / Sat	03:00 pm-06:00 pm	MOCK # 1 Morning Session		
			07:00 pm-10:00 pm	MOCK # 1 Evening Session		
WEEK # 37	Test # 27	22-May-16 / Sun	09:00 am-12:00 pm	MOCK # 2 Morning Session		
			01:00 pm-04:00 pm	MOCK # 2 Evening Session		
WEEK # 39	FINAL EXAM ON JUNE 04, 2016					