



# FINNACLE INSTITUTE

**20TH**  
YEAR OF OPERATION  
(SINCE 2003)

BIGGEST  
**FINANCE**  
ACADEMY OF INDIA

**20,000+**  
STUDENTS TRAINED  
FULL TIME

Training  
**Programmes**

- 1) Basic CFA (USA) Exam prep**
- 2) Advanced CFA 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	\$990	\$1090	\$1090
Standard Registration Fee	\$1290	\$1390	\$1390

# CFA (USA)

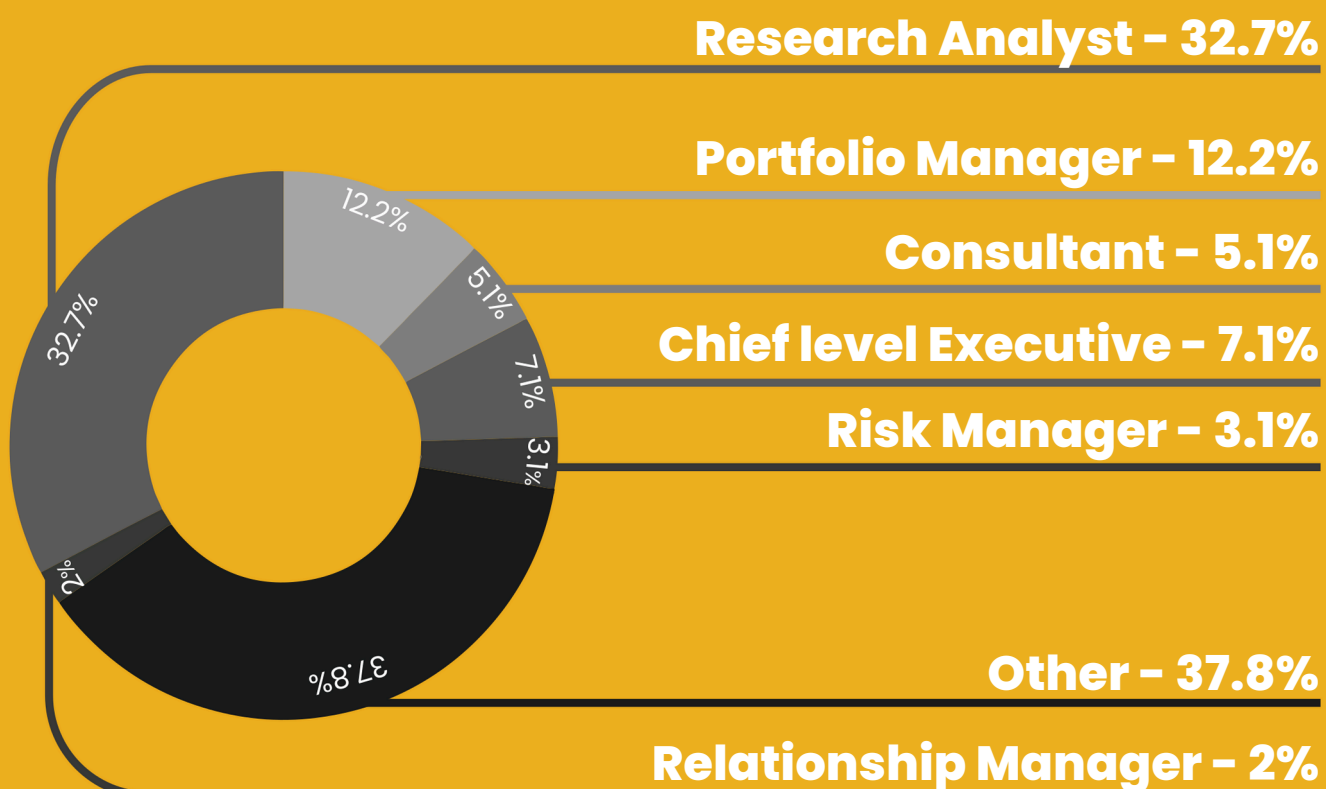
[World's most recognised Investment Program]

## Registration Deadline & Career Prospects

Exam Attempt	Early Registration \$990	Standard Registration \$1290
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

**Registration  
Deadline**

What are CFA's  
**Career and  
Job Prospects?**

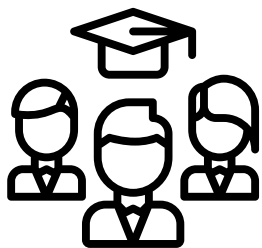


# CFA (USA)

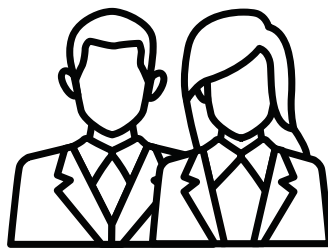
[World's most recognised Investment Program]

## Finnacle Institute Track Record in CFA Training

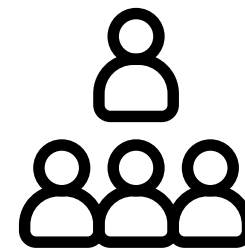
Finnacle Institute (Earlier called as Laukik Shah Classes) brings with itself a legacy in CFA Coaching and CFA Program training, with the most experienced CFA trainer in India Mr. Laukik Shah – training for CFA since 2003.



**20000+  
Students**



**20+ Years  
Experience**

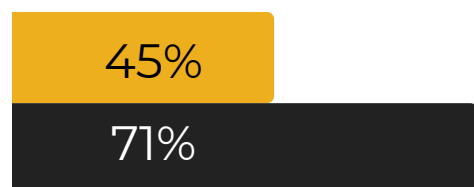


**150+  
Batches**

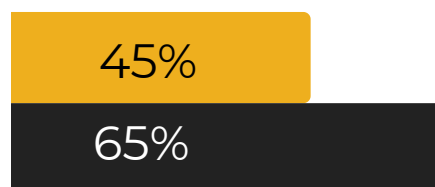
### What are the passing rates for CFA?

■ CFA Institute

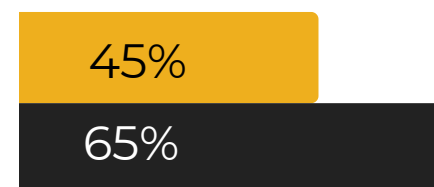
■ Finnacle Institute



**Level 1**



**Level 2**



**Level 3**

**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 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

# Recent World Top Ten Percentile Scorers



**HARSH  
TOSHNIWAL**



**SHIVAM  
DAVE**



**SMITI  
SHAH**



**ANUSH  
JAIN**



**NIDHI  
PAUSKAR**



**KRISHA  
SHAH**



**ZEEL  
JAIN**



**LEROY  
DSOUZA**



**TANMAY  
JHAVERI**



**MOHIT  
LADKANI**



**RITHIKA  
MEHTA**



**VIRAG  
SHAH**



**MRIDUL  
AGARWAL**



**UTSAV  
SHAH**



**DEVAM  
VAKHARIA**



**JAY  
SHAH**



**DHRUV  
BAFNA**



**TANVI  
PALEP**



**KRISHA  
PATEL**



**NAMAN  
CHAOUDHARY**



**PREET  
JAIN**



**DAKSH  
MALI**



**PAVITRA  
KANAKIA**



**ADITYA  
JADHAV**

# CFA Advanced Training Program ( FinBridge )

PLACEMENT INTO CORE FINANCE

## **Advanced CFA Training Program**

### **Introduction**

# CFA Advanced Training Program ( FinBridge )

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 PLACEMENT INTO CORE FINANCE**

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

**Eliminates these pain points &**

**Gives a Headstart to  
Beat the Competition**

# CFA Advanced Training Program ( FinBridge ) WITH 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 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 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 Advisors

[Click Here](#)

*and many more!!*



# CFA Advanced Training Program ( FinBridge )

WITH 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 candidates who appeared for CFA L1 Exams after clearing our Advance training




85%

# CFA Advanced Training Program ( FinBridge )

WITH PLACEMENT INTO CORE FINANCE

## Stage 2 - Campus Placement

 **Campus Placement right after Level 1**

 **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**

Median Package

₹ **16.5 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 PLACEMENT INTO CORE FINANCE

## Stage 2 - Campus Placement



### 80+ Campus Recruiters

INCLUDING SOME OF INDIA'S TOP FINANCE COMP/



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 Package into the same Premium Profiles.

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

### Stage 3

#### CFA L2 & L3 Training

L2 Prep & L3 Prep on weekends.

All 10 subject of L2 & L3 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

Contents	CFA Basic Prep	CFA Advance Training
FOCUS ON CLEARING CFA EXAMS	✓	✓
PROPRIETARY DETAILED QUESTION BANK SOLVING	✓	✓
DOUBT SOLVING 24*7 FACILITY & PERSONALISED SESSIONS	✓	✓
ABOVE AVERAGE PASSING RATES IN CFA EXAMS	✓	✓
BE ONE OF THE YOUNGEST TO BECOME ELIGIBLE FOR CFA (USA) CHARTER	✗	✓
DUAL CERTIFICATION	✗	✓
FULL TIME ROLE CAMPUS PLACEMENT	✗	✓
CAMPUS PLACEMENT AS ANALYST IN TOP PROFILES LIKE IB/PE/PMS/VC	✗	✓
HIGHER STARTING PACKAGES (EVEN FOR A FRESHER/ UNDERGRADUATE STUDENT)	✗	✓
ADDITIONAL TRAINING TO GAIN IN-DEPTH PRACTICAL KNOWLEDGE & SKILLSETS OF INDIAN CAPITAL MARKETS	✗	✓
CORPORATE EXPOSURE AT UNDERGRADUATE LEVEL	✗	✓
GUEST SESSIONS BY TOP ANALYST & CIO'S OF CAPITAL MARKETS	✗	✓
OPPORTUNITY TO BECOME INDIA'S YOUNGEST FINANCIAL ANALYST	✗	✓
BOTH CLASSROOM (OFFLINE) & ONLINE MODE AVAILABLE	✓	✓
MINIMUM TIME REQUIRED TO CLEAR ALL CFA LEVELS	2.5 - 3 years	3-3.5 years
MEDIAN PACKAGES	Market median After CFA L3 for a fresher - INR 6-8 LPA	Right after CFA L1 (even for fresher & undergrad student) median INR 8 LPA

# CFA Advanced Training Program ( FinBridge )

## WITH 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 and academically meritorious

**Students 100%** Scholarship & placement upon clearance of the program.

Students will be selected based on Latest Educational Qualification, Letter of Intent and Personal Interview

### 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



[www.finnacleinstitute.com](http://www.finnacleinstitute.com)



[info@finnacle.co.in](mailto:info@finnacle.co.in)



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



## **Finnacle Institute - Mumbai**

**Corporate Office - G16-Summit Business Bay, Andheri East**

**Classes at Andheri (E) & (W) | Dadar | Grant Road | Borivali | Thane**

**( All branches within walking Distance from station)**

**+91 6355043018**

**+91 9322255530**

## **Finnacle Institute - Surat**

**3rd Floor, Money Arcade, Vesu, Surat - 395007**

**+91 9157740227**