

### GOAL

#### MF1 Ethical and Professional Conduct

Graduates will conduct themselves in alignment with the CFA Code of Ethics and Standards of Professional Conduct.

#### MF2 Financial Markets, Institutions, and Instruments

Graduates will demonstrate an understanding of financial markets, instruments, and institutions.

#### MF3 Portfolio Management

Graduates will understand the motivations of investors and manage an investment portfolio that achieves those objectives.

#### MF4 Data Analysis

Graduates will be proficient in data management, analytics, and modeling.

#### MF5 Communication

Graduates will be effective communicators.

### LEARNING OBJECTIVES

1.1 Graduates will be able to discuss the impact of corporate decisions on society as well as models of ethics and corporate social responsibility and act in a manner that will reflect credit on themselves and the profession.

1.2 Graduates will demonstrate professionalism in their interactions by maintaining independence and objectivity, and not knowingly make any misrepresentations or engage in dishonesty, fraud, or deceit.

2.1 Graduates will be able to explore the characteristics of equity investments, security markets, and indexes and analyze how industries, companies, and equity securities as well as the use basic equity valuation models.

2.2 Graduates will be able to describe fixed income securities and their markets, yield measures, risk factors, and valuation measurements and drivers.

2.3 Graduates will be able to describe basic derivatives and derivative markets as well as the essential features and valuation concepts for forward commitments and arbitrage.

2.4 Graduates will be able to critically define and analyze alternative investments including hedge funds, private equity, real estate, commodities, and infrastructure and identify important considerations when making investment decisions.

2.5 Graduates will be able to describe the form and function of various financial institutions and their role in the intermediation process as suppliers of funds.

3.1 Graduates will be able to develop an investment fund policy and determine how best to match investments with the objective of the fund.

3.2 Graduates will be able to identify principles and techniques of risk management and critically discuss and measure major types of risk including market risk, credit risk, liquidity risk, and operational risk as well as identify instruments to hedge risk.

3.3 Graduates will be able to apply sustainable financial principles and mechanisms to business issues and articulate the motivations for the sustainability of financial institutions, institutional investors, and their role in transitioning to a sustainable economy.

4.1 Graduates will be able to apply advanced quantitative techniques to collect, store, clean, analyze and visualize structured and unstructured data to support data-driven decision-making.

4.2 Graduates will be able to develop statistical models and program simulations to better understand financial data.

5.1 Graduates will be able to present information clearly and concisely to educate or inform an audience.

5.2 Graduates will prepare well-organized reports that provide a clear, rational, and persuasive justification for a course of action.