

SOCIETY UPDATE Q2/2023

Dear Members,

Our Society Update informs you about our most recent and upcoming activities, committee work, events and videos.

It has been a busy Spring, with **11 on-line events**, and **11 in-person events**, including **networking events in four cities**. Many members have enjoyed meeting up again and we will continue to provide more such opportunities for exchange going forward.

Our expert working groups also remain productive; **the Behavioral Finance Group** has just written a paper, based on the results of a Society member survey on this topic. Please read on to learn more about the paper and its results.

The association lives from its members and their support. Therefore, we are always open to new suggestions and your feedback. Do you have an idea for a speaker or a topic? We would like to hear about it, so please send your suggestion to info@cfa-germany.de

Sincerely,
Susan Spinner, CFA
CEO of CFA Society Germany

PS: We value your membership!
Please Renew soon.



WORKING GROUPS AND STANDARD SETTING

THE PREVALENCE OF BEHAVIOURAL SCIENCE IN THE GERMAN FINANCIAL INDUSTRY

We are very pleased to share with you the latest publication of our GAC working group on the topic of "Behavioural Science": Our members Martin Sauermann, CFA and Florian Wedlich, CFA conducted a member survey to investigate the current prevalence of "Behavioural Science in the financial industry in Germany", including questions about its benefits and potential.



Dr. Florian Wedlich, CFA

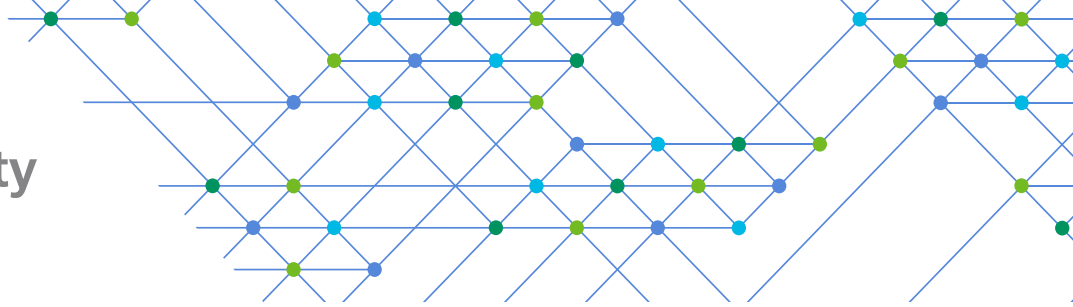


Dr. Martin Sauermann, CFA

Key findings included: Behavioural science is generally viewed positively, and its benefits for business success are considered significant. Furthermore, behavioral science methods are already widely used in companies, even if not systematically and stringently.

The further results of the survey can be found [in the paper](#) on our website or in the [press release](#). We thank the two authors for their work and the resulting findings, as well as all members who participated in the survey!





CALL FOR PAPERS

CFA GERMANY INVESTMENT RESEARCH AWARD 2023

The annual CFA Germany Investment Research Award is being presented for the third time this year.

It honors excellent research and findings in the fields of investment, finance, economics, business and accounting that are of practical relevance.

We are looking forward to receiving submissions electronically by **September 15th, 2023**, through the dedicated [nominations platform](#).

You can find more information about the process in our [factsheet](#) or on our [website](#).



MEMBERSHIP RENEWAL

RENEWAL 2023

1. Support your local CFA Society to develop and protect the interests of the profession
2. Network with peers
3. Continue to learn and develop professionally

all, you make it possible through your membership fee that we continue to promote the concerns of the association and to further increase the reputation of the CFA® Program in Germany.

As a member, you benefit from our member advantages, including free or reduced participation fees at our (continuing education) events. Above

If you haven't yet, please take 5 minutes to [renew your membership today](#).

Expand your knowledge and network with fellow professionals.

[Renew your membership now.](#)



VERKEHRTE (FINANZ)WELT

WirtschaftsWoche

01.06.23 | André Stagge, CFA:
Ist die 200-Tage-Linie der beste Filter für Anlageentscheidungen?
[... read article](#)

23.05.23 | Dr. Andreas Sauer, CFA:
Das Portfolio aus dem Computer
[... read article](#)

10.05.23 | Prof. Dr. Michael Schmitt, CFA, und Prof. Dr. Michael von Thaden:
Was kann und was darf künstliche Intelligenz in der Finanzbranche? [... read article](#)

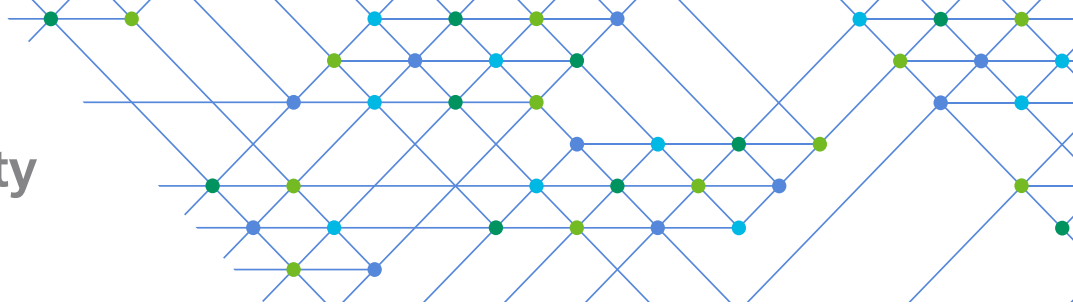
25.04.23 | Ludwig Gatti, CFA:
Geldanlage: Der Blick in die Glaskugel – so kalkulieren Profis
[... read article](#)

11.04.23 | Andreas Naujoks, CFA:
Diversifiziert sein – nie wichtiger als heute, aber anspruchsvoller denn je [... read article](#)

28.03.23 | Insa Glag, CFA & Lars Bill, CFA:
Die „komplementäre“ Beziehung von Banken und Fintechs [... read article](#)

14.03.23 | Bernhard Langer, CFA:
Lohnt es sich für Privatanleger, auf „Faktoren“ zu achten? [... read article](#)

28.02.23 | Tanja Siegrist, CFA, und Erik Mulder, CFA:
Die Aktienrente – eine Zeitenwende für das deutsche Rentensystem [... read article](#)



UPCOMING EVENTS

19.07. | FRANKFURT | CASUAL EVENT: SUMMER HAPPY HOUR

We are partnering with our friends at Deloitte and invite you to a Summer "Happy Hour" Event at the office of Deloitte in Frankfurt.

Join us for an evening of networking with peers and colleagues, while enjoying a variety of appetizing finger food and drinks.

Details: 18:00-21:00 | Members only
[Register on our website.](#)



CONTENT HUB – ONLINE

MISSED A CFA LECTURE? WATCH THEM ON DEMAND

In the members' area of our website, you will find a selection of [recorded lectures](#), which can be accessed by our members at any time free of charge. Furthermore, there are also many [presentations](#) available for download, which the speakers have made available to us. Have a look!

[To the videos](#)

[To the presentations](#)

UPCOMING EVENTS 2023

20.06. | Düsseldorf | CASUAL GET-TOGETHER
Members only | [Register now](#)

22.06. | Munich | CASUAL EVENT | Members only
Vesper-Party in Munich. [Register now](#)

29.06. | Frankfurt | CASUAL EVENT | Members only
Rooftop Terrace Reception. [Sold out](#)

06.07. | virtual | CFA WORKSHOP
Christoph Lemke: **High Impact Presentations made simple.** [Sold out](#)

06.07. | Hamburg | CFA LECTURE & NETWORKING EVENT
Dr. Julian Hochscherf: **Principal Adverse Indicators und SFDR-Berichtstemplates: War's das oder kommt noch was?** [Register now](#)

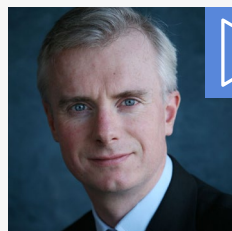
19.07. | Frankfurt | CASUAL EVENT | Members only
Summer Happy Hour. [Register now](#)

25.07. | Munich | CFA LECTURE & NETWORKING EVENT
Nicholas Gartside, CFA: **When TINA meets TARA – A Tale of Transformation.** [Register now](#)



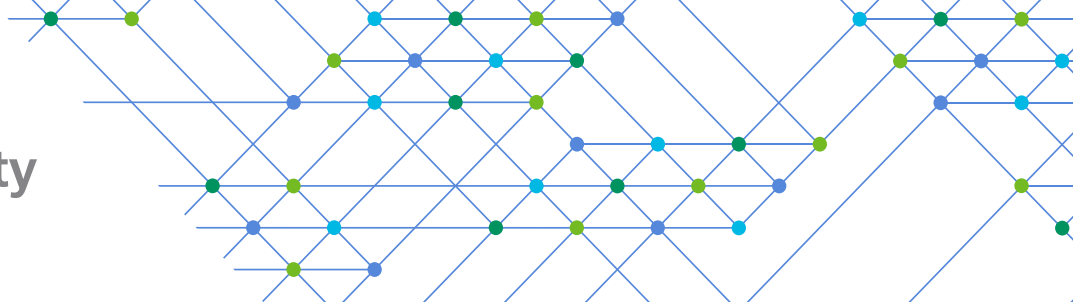
WATCH VIDEO

Dr. Jochen Papenbrock
AI Clouds In Investment
Management



WATCH VIDEO

Dr. Michael O'sullivan:
Breaking Things



PAST EVENTS

INSTITUTIONAL MONEY CONGRESS

On April 18 and 19, our Society was represented with a booth at this year's Institutional Money Congress in Frankfurt. The office team was pleased to see so many members among the many visitors who stopped by our booth to say hello, request their professional learning credits and receive a Society give-away. All participating members also had the chance to win a special prize (Hugendubel Gift Certificate) and the lucky winner was Simon Frank, CFA. Congratulations!

We would also like to thank Joachim Klement, CFA, who accepted our invitation to speak and gave an engaging presentation. The chief strategist of the British investment bank Liberum analyzed the impact of geopolitical risks and inflation on the financial markets, especially the simmering conflict between the U.S. and China over the Taiwan issue.

Impressions of the Institutional Money Congress 2023



PAST EVENTS

SYMPOSIUM PERFORMANCE MEASUREMENT AND GIPS

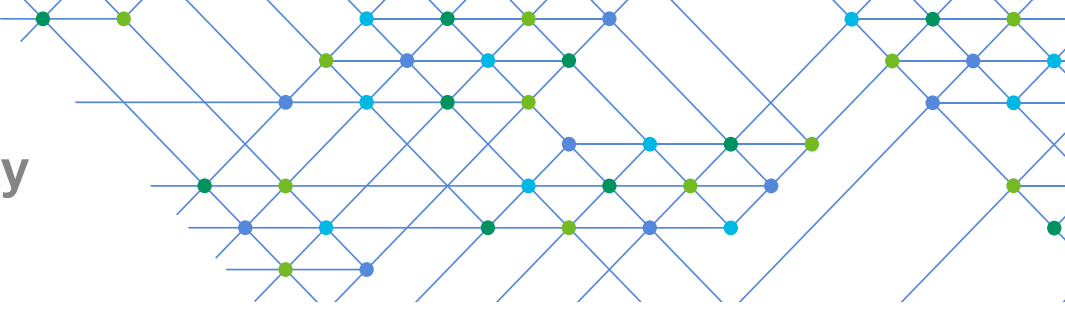
On June 1, the 17th Symposium GIPS and Performance Measurement - a joint event of CFA Society Germany and BVI - took place in Frankfurt. At the beginning, Rudolf Siebel, Managing Director of the BVI, and our CEO Susan Spinner, welcomed the approximately 65 participants. The subsequent program included various panel discussions, workshops and presentations on topics such as performance in investment management and sales as well as performance controlling.

Andreas Rätzel, CFA, member of the Society and the German Advocacy Committee (GAC), presented on the current status of ESG and performance measurement and highlighted the current work of two Society working groups, "Risk Assessment ESG Investments" and "ESG Ratings", in which he himself is involved.

Society member Ralf Hudert, CIPM, participated in a panel discussion on current trends in performance measurement and led a workshop on "Data Consistency in Performance Measurement: Pitfalls and Problem Solving Approaches for Practitioners." Finally, Beth Kaiser Schwartz, CFA, CIPM, Director, CFA Institute, provided attendees with an update on new benchmark concepts in the GIPS standards.

From the left: Susan Spinner, CFA, Andreas Rätzel, CFA, and the audience





PAST EVENTS



BAI CONFERENCE

We partnered again this year with BAI at their conference on April 23 and 24 in Frankfurt. At this year's meeting for institutional investors and the Alternative Investment industry in Germany, the keynotes, expert presentations and panel discussions focused primarily on topics such as geopolitical changes and the energy transition. The keynote speech this year was given by Prof. Dr. h.c. Monika Schnitzer, Professor of Economics at the University of Munich and since April 2020 since October 2022 Chair of the so-called "economic wise (wo)men". The topic of her presentation was Germany as an investment location in times of geopolitical change.



PAST EVENTS

CFA FORECAST DINNER IN MUNICH

On May 9, the CFA Society Germany hosted its 14th Munich Forecast Dinner – this year for the first time at the Bayerischer Hof. Over 80 professionals from the Munich investment community heard a keynote speech from Prof. Dr. Andreas Löschel (Link to website BIO) on the broad challenges of the energy transition in Germany in particular, but also in Europe and globally.

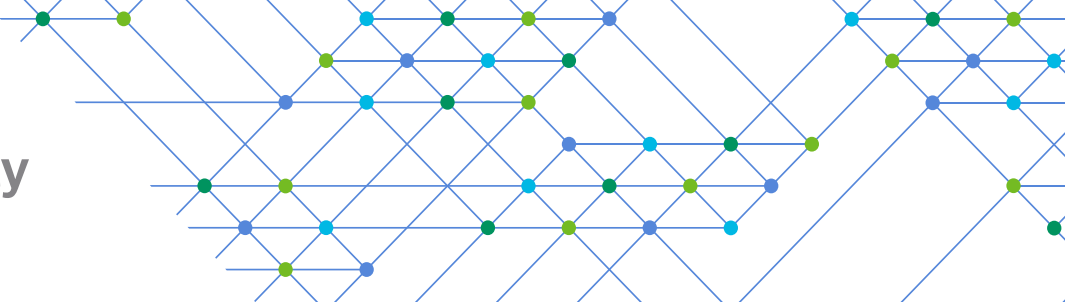
In his speech, he explained what needs to be done nationally and globally to drive forward climate protection and which measures are relevant for this in the various sectors – from hydrogen to heat pumps.

His presentation was informative and yet raised more questions from the audience than any previous at a Munich Forecast Dinner. In the second part of the event, Alexander Hagelüken, Managing Editor of the Süddeutsche Zeitung for Economic Policy, moderated the audience's many questions.

Our special thanks to our exclusive event sponsor Lupus Alpha, as well as our event partners J. Safra Sarasin, Baader Bank, Deloitte, DZ Bank.

Impressions of the 14th Munich Forecast Dinner





PAST EVENTS

GET TOGETHERS

In March, informal Get Togethers were held again in Berlin, Düsseldorf, Frankfurt and Munich. Our members met to exchange ideas, network and toast the nicer weather with fellow CFA Charterholders.



Berlin



Frankfurt



Düsseldorf



Munich



SOCIAL MEDIA

STAY CONNECTED

Follow CFA Society Germany on social media to keep up-to-date with our latest activities, news, and events and benefit from a range of useful information. We'd love you to give us a follow and connect with us! You

can catch us on [LinkedIn](#) and [Twitter](#). Make sure to mention us in your postings! We also invite you to join our [CFA Society Germany | Members Group](#) as well as our [CFA Society Germany | Candi-](#)



[dates Group](#) on LinkedIn! This group serves as a platform for our Society members to share experiences and knowledge, provide insights, ask for advice and build valuable contacts within the CFA Germany network.