

# SOCIETY UPDATE 02/2022

Dear Members,

Summer is here and I think that we have all enjoyed the better weather and the chance to see one another again in person. In this spirit, the Society has held in-person events in Berlin, Düsseldorf, Munich and Frankfurt in the past weeks, and it has been wonderful to see old friends and meet new members. Several lectures will also be held in-person into the Fall.

Meanwhile, the world remains unsettled and financial markets reflect many of these uncertainties. We are focused on providing events with leading experts that shine a light on these complex investment issues, while at the same time offering networking formats, both virtual and in-person, to support the sharing of member ideas and experiences within our CFA community in Germany. With this in mind, our Society Update brings you information on our most recent and upcoming videos, activities, committee work and events.

We always appreciate your input, suggestions and ideas. If you are interested in volunteering, or wish to share an idea with us, please contact us at [info@cfa-germany.de](mailto:info@cfa-germany.de).

Wishing everyone well and thank you for your support of the Society.

Sincerely,  
Susan Spinner, CFA  
CEO of CFA Society Germany



PAST EVENTS

## CASUAL ROOFTOP PARTY

Finally in-person! We were delighted to welcome members to our beautiful rooftop terrace for a summer get-together.



RENEWAL

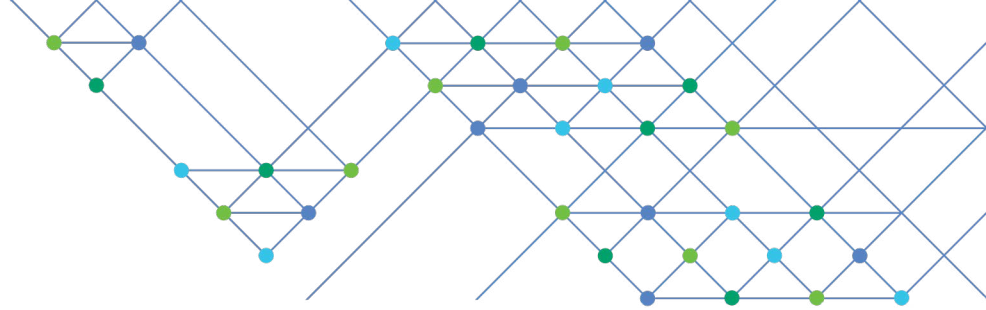
## RENEWAL 2022

Please renew your membership today and

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

**Deadline to renew is July 31, 2022.**

[Why not renew now?](#)



Top and bottom left: Impressions of the dinner

Top right: After his dynamic and exciting keynote, China-expert Prof. Dr. Markus Taube (on the left) was interviewed by Alexander Hagelüken of Süddeutsche Zeitung and answered questions from the audience.

PAST EVENTS

## MUNICH FORECAST DINNER 2022: THE CHINA FACTOR IN THE GLOBAL ECONOMY

Unfortunately, our traditional Munich Forecast Dinner could unfortunately not take place in the past two years due to the corona pandemic. Therefore, CFA Society Germany was all the more pleased to host the 13th edition of the event on 10 May 2022.

Over 70 professionals from the Munich investment community heard a fascinating keynote speech by renowned China expert Prof. Dr. Markus Taube on the competition on global leadership between China and the USA that will shape and significantly change the global economy for years to come. Clear is: Europe's businesses and politicians must react to this changing landscape and make fundamental decisions for their future.

But what is driving China's elites? How powerful and adaptable are China's companies and the economy as a whole? Are win-win solutions also possible with the "systemic rival" China? And what about Germany's thus far successful concept of "change through trade" in relation to China? These questions were the focus of Taube's keynote. Following his presentation, Taube answered questions from the audience, initiated inspiring discussions afterwards and helped to make the event a big success.

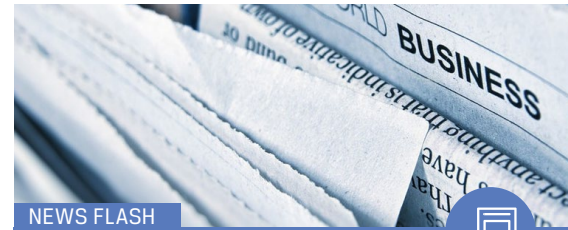
A special thanks goes to our exclusive event sponsor Lupus Alpha, as well as our event partners - Baader Bank, DZ Privatbank, and Credit Suisse.

JOB PORTAL

## LOOKING FOR THE BEST EMPLOYEES?

Use our exclusive job board service, [CFA Job Portal!](#) Post and promote your job advertisement among CFA® charterholders in Germany and thus the most qualified employees in the financial industry.

A job posting on CFA Job-Portal reaches an exclusive platform of over 2,800 CFA Society Germany members (94% CFA charterholders, 5% candidate members) and highly qualified applicants.



NEWS FLASH



## PRESS RELEASES

**01.02.** | CFA Society Germany lobt den Investment Research Award 2022 aus ... [read article \(DE\)](#)

**04.02.** | Team der WHU - Otto Beisheim School of Management gewinnt das Deutschland-Finale der CFA Institute Research Challenge ... [read article \(DE\)](#)

## NEWS COVERAGE (highlights)

**02.02.** | **FONDS professionell:** Weiterbildungsangebot für ESG-Experten gestartet ... [read article \(DE\)](#)

**07.02.** | **Stern.de:** ALTERSVERSORGUNG IM VERGLEICH: Warum Island wohl das weltbeste Rentensystem hat – und was Deutschland sich davon abgucken kann ... [read article \(DE\)](#)

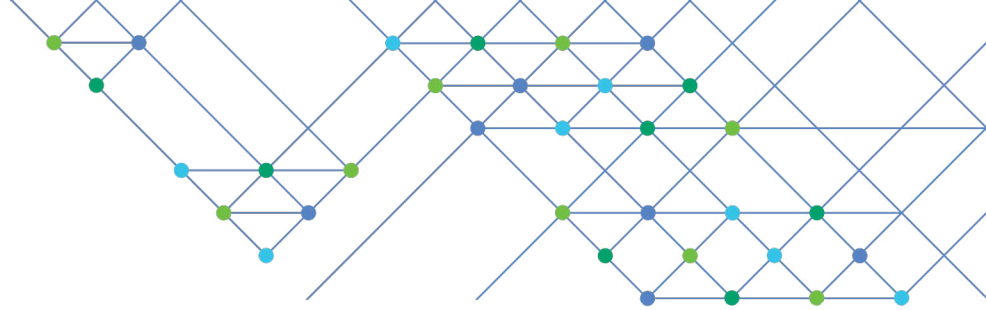
**16.02.** | **Finanzwende Recherche:** Die dunkle Seite des Aktienkaufs via App ... [read article \(DE\)](#)

**28.02.** | **FinanzNachrichten:** The Standards Board for Alternative Investments brings together industry organisations to address diversity in alternatives ... [read article \(EN\)](#)

**05.05.** | **NerdsWire:** Ethical Standards You Should Expect From Financial Advisors ... [read article \(EN\)](#)

Want to know more on how to post your job ad?

All details can be found on our [website](#) and in our [factsheet](#).



PAST EVENTS

## CASUAL GET-TOGETHER IN MUNICH, BERLIN & DÜSSELDORF

We took advantage of the good weather in May and June and organized our first 2022 in-person get-togethers this year in Munich, Berlin and Düsseldorf. These networking events for members and candidate members of CFA Society Germany were well-received in all locations!



## WORKSHOP ON CAPITAL MARKET REGULATION

In April our participants had the chance to learn the essentials of capital markets and securities regulation in Germany and the EU in an online workshop.

Our long-standing speaker Martin Foelsch (German Federal Ministry of Finance) once again shared his expertise in German and European regulation, banking law and more, focusing on the practical uses and implementation for investment professionals. As always, with a great practical relevance and in a very compelling personable style.



## EARN THE CERTIFICATE IN ESG INVESTING.



NEWS

## CERTIFICATE IN ESG INVESTING

Learn how to make a difference in your career – and the world.

The Certificate in ESG Investing\* gives you the knowledge you need to manage investments with a focus on integrating environmental, social and governance factors. It can help you gain an edge in a fast-moving market.

[Sign up to learn more.](#)

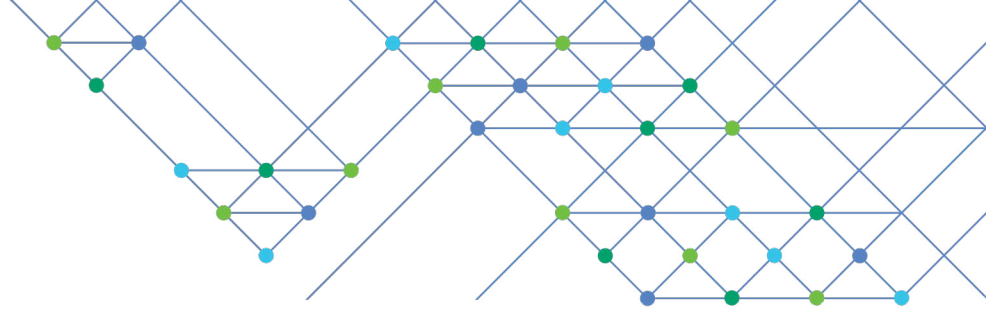


FINAL CHANCE TO SUBMIT

## CALL FOR PAPERS | CFA GERMANY INVESTMENT RESEARCH AWARD 2022

We are pleased to accept submissions for the second edition of our annual CFA Germany Investment Research Award, which recognizes outstanding research in the field of investment. An expert jury will select papers in the field of investment research with regard to their scientific contribution and practical relevance.

Amongst other recognition, the CFA Germany Investment Research Award is endowed with 500 EUR. Submissions for the CFA Germany Investment Research Award can be made by **June 30, 2022**. Find all details on our [website](#) and in our [Factsheet](#).



NEWS FLASH



## WirtschaftsWoche

### Series "Verkehrte (Finanz)Welt"

15.03. | Jens Kummer, CFA:

Führt hohes BIP-Wachstum zu höheren Aktienrenditen?

... [read article](#)

29.03. | Martin Hermann, CFA:

Ist Europas Digitalisierungs- und Klimaschutzprogramm eine Chance für Anleger?

... [read article](#)

12.04. | Prof. Dr. Stefan Vieweg, CFA:

Nachhaltiges Investment statt Green-Waschanlage

... [read article](#)

26.04. | Maria Vogt, CFA:

Birgt die neue Inflationswelt auch Chancen?

... [read article](#)

10.05. | Dr. Martin Sauermann, CFA:

Vorsicht vor „Killer Acquisitions“

... [read article](#)

24.05. | Heinrich Ey, CFA:

Sind kleine Unternehmen beim Thema ESG Benachteiligt?

... [read article](#)

07.06. | Marko Grassmann, CFA:

Mehr Rendite bei weniger Risiko? Die Volatilitätsanomalie

... [read article](#)

20.06. | Dominik Moulliet, CFA und Ramona Rueckbeil, CFA:

Die Asset-Management Industrie muss sich an den Erwartungen der Anleger orientieren

... [read article](#)

**MORE EVENTS ARE BEING PLANNED FOR THE UPCOMING MONTHS. YOU WILL SOON FIND THEM ON OUR [WEBSITE!](#)**



UPCOMING EVENTS



## 01.09. | CFA Lecture with Best-selling Author Antti Ilmanen

Antti Ilmanen shares key insights from his latest book **Investing Amid Low Expected Returns: Making the Most When Markets Offer the Least**. The book delivers a timeless - and timely - treatment of strategic investment processes in times of low expected returns. It explains how the decades-long fall in required returns in all major asset classes has given great tailwinds until now but promises headwinds – slow pain or fast pain – for the future. [Register now!](#)

VIDEOS

## SUSTAINABLE FINANCE: MORE TO COME!



This webinar with Wiebke Merbeth and Prof. Dr. Christian Klein highlighted the theoretical and practical considerations of sustainable finance for the financial sector and the capital market – followed by a discussion round with Thimo Worthmann, CFA to get to the bottom of the issues surrounding liability and corporate governance in sustainable finance.