

Investment Platform > Research Analysis

Title	Develop oral and written research reports
Code	106801L5
Range	Developing research reports to communicate research findings related to investment. This applies to research reports in oral and written format for different purposes (research on macroeconomic developments, industries analysis, company analysis, etc.) and across different types of readers (e.g. internal clients, external customers, public, etc.)
Level	5
Credit	4 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Demonstrate professional research knowledge in investment analysis Be able to: <ul style="list-style-type: none"> • Demonstrate professional knowledge in relations to finance and modeling for communicating the research findings in an articulated manner • Evaluate the features and characteristics of different asset classes for interpreting the research findings 2. Evaluate the needs and preferences of targeted audience Be able to: <ul style="list-style-type: none"> • Analyze needs / interests of different groups of audience to identify their informational needs and customize the content • Analyze the needs and preferences of different groups of audience in order to design the format and frequency of publications (e.g. research reports, newsletter, email alerts, quarterly fact sheets) 3. Develop reports to present the findings and conclusion Be able to: <ul style="list-style-type: none"> • Evaluate different researches on economic, market / sector / investment assets, extract information useful for different groups of clients and develop the report content • Coordinate with different parties in arranging the publication and disseminations of research reports • Customize presentation style and approach according to needs and knowledge of different audience • Develop presentation materials to facilitate client meetings and/or seminars • Deliver oral presentation about the research findings and handle the enquires from audience
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Development of oral / written reports on research findings. This should be based on analysis of profiles of different groups of audience, such as their informational needs, interests, preferences, etc.
Remark	