



## WHAT'S NEW

### 2023 CFA Institute Research Challenge Winners - Local Competition

Congratulations to the students from the University of Waterloo for their compelling research which earned them the winning title at the local level of the CFA Institute Research Challenge. The student team members each received one thousand-dollar prize and will be advancing to the sub-regional competition of the CFA Institute Research Challenge. The team was mentored by Steve Balaban, CFA, Faculty Advisor, and by Jeannine LiChong, CFA, CPA, CA, Industry Mentor. Winners of each sub-regional level will advance to the regional semi-finals on 6 - 7 April 2023. [Read the full story](#)



From left to right: Joyce Ren, Rocky Luo, Philbert Chan, Jennie Lin, Sonia Balani, Jeannine LiChong, CFA, CPA, CA, Industry Mentor and Steve Balaban, CFA, Faculty Advisor



**29 March 2023 | 12:00 - 1:00 PM (ET)**

Please join us for an extensive discussion about all things fixed income as we benefit from Dominic's established career on both the sell side and buy side; from trading fixed income products to direct portfolio management and now in his role helping run the entire \$50+ billion fixed income process at iA Investment Management. Learn about the skills needed for a successful career in fixed income, as well as the future direction of the business in a rapidly changing global economic environment.

**Fee: Complimentary for Members**  
**Registration Deadline: 25 March - 11:59 PM**

[Click here for more information and to register](#)



**29 March 2023 | 5:30 - 7:30 PM (ET)**

This event provides a unique opportunity for you to connect and build relationships with other financial professionals who are in the same membership cohort as you. Attendees will also have the opportunity to meet CFA Society Toronto Staff and Board Members who can offer guidance on how to get the most out of your membership and be more involved within the financial community.

**Fee: Member Ticket \$15 +HST**  
**Registration Deadline: 26 March 2023 - 11:59 PM**  
Space is limited! Walk-Ins will not be permitted.

[Click here for more information and to register](#)



**30 March 2023 | 3:00 - 4:15 PM (ET)**

**Fee: Candidate and Member Ticket \$29 +HST**  
**Non-Member Ticket \$44 +HST**  
**Registration Deadline: 28 March - 11:59 PM**

[Click here for more information and to register](#)

The glory days from 2020 – 2022 seem long gone. Crypto winter is upon us and FUD is here (fear, uncertainty, and doubt, for those unfamiliar with the crypto slang).

There is a lot to unpack: will BTC climb again to eclipse US\$70,000; will the ETH Merge prove that blockchain doesn't need to be energy intensive; is there a future for stablecoins after the collapse of Luna and Terra; why were people willingly paying millions of dollars for JPEGs; is staking dead especially; can exchanges survive following the collapse of FTX? And we haven't even mentioned the uncertainty around regulation and how that will change the entire ecosystem.

In the CFA Society Toronto's Innovation Series, learn from true crypto experts on how organizations are adapting and key lessons learned. We will be joined by David Duong, CFA, Head of Institutional Research with Coinbase, and Eric Richmond, Chief Operating Officer with Coinsquare to discuss all the good, bad, and ugly within crypto in 2023.

[See full calendar](#)

If you are having difficulties registering or have feedback, please contact [eventregistration@cfatoronto.ca](mailto:eventregistration@cfatoronto.ca) for assistance.



**START 2023 ON THE RIGHT FOOT.**

**REGISTER FOR THE CERTIFICATE IN ESG INVESTING NOW AND RECEIVE EXCLUSIVE BENEFITS!**

### Are you ready to Jumpstart your career?

Register for the **Certificate in ESG Investing** now and receive exclusive benefits! The CFA Institute Certificate in ESG Investing will help you to accelerate your career by giving you the knowledge needed to manage investments with a focus on integrating ESG factors. You will develop expertise in a field in high demand by top firms worldwide and become part of the solution to the top issues impacting our world.

**Register by 31 March 2023 to receive exclusive access to:**

- Three webinars that will support your exam prep and guide your learning
- A discount code offering 10% off your registration price for the CFA Institute "Climate Risk and Returns: Shaping a Sustainable, Profitable Future" event.

[Learn more and register](#)

## ANOTHER WAY OF THINKING

Embracing neurodiversity in finance

by Hisham Yakub, CFA



### Embracing Neurodiversity in Finance

Author: Hisham Yakub, CFA

Neurodiversity is a term that we've all heard. Still, many of us need help understanding the full scope of its meaning, particularly when applying diversity and inclusion to neurodiversity in the workplace. "Neurodiversity defines the natural brain variations that cause people to think, learn, and behave differently than what is considered the cognitive norm, or neurotypical."

[Click here to read the full article](#)

## INVESTORS TAPPING DEI FOR PERFORMANCE EDGE

by Mark Timm, CFA

### Tapping DEI for Performance Edge

Author: Mark Timm, CFA

Diversity, equity, and inclusion (DEI) have emerged rapidly in recent years as corporate sustainability variables, including in the investment industry. But are investment managers going beyond corporate DEI policies to integrate DEI in investment decision-making because of an anticipated performance impact

[Click here to read full article](#)

[Read all current and past issues of \*The Analyst\*](#)

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## CAREER CENTRE

06 Mar	Senior Quantitative Analyst – Structured Products
02 Mar	Associate / Senior Associate - Private Market Investments
14 Feb	Associate Investment Advisor
13 Feb	Equity Research Associate / Financial Services & Small Cap Growth
13 Feb	Associate, Portage
09 Feb	Credit analyst, Fixed Income
01 Feb	Analyst, Client Experience and Proposal
29 Jan	Investment Analyst, Infrastructure & Natural Resources - Value Creation
20 Jan	Director, Business Development
20 Jan	Specialist, Investment Strategy and Governance
17 Jan	Investment Analyst - Fixed Income
17 Jan	Equity Research Associate

[Members click here to see all employment opportunities](#)

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## MENTORSHIP



**KNOWLEDGE NETWORK  
DIRECTORY**  
Connecting Toronto's  
CFA Community

### Looking for expert guidance?

The Knowledge Network is the perfect solution! Our online directory connects CFA Society Toronto members to a wealth of skilled professionals, providing access to industry trends, best practices, career advice, and more. Plus, with exclusive access to a diverse range of subject matter experts, you can build your knowledge and get just-in-time advice based on real-world experiences. Don't miss out

[Connect with us!](#)



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ANYTHING**

Revealing  
practitioner tips, tricks and  
solutions on how to effectively navigate  
your career path

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## AWARDS AND UNIVERSITY RELATIONS EVENTS

### CFA Program and Career Insights Speakers Series

Brian Madden, CFA, CFP, CIM  
Chief Investment Officer  
First Avenue Investment Counsel

Fred Pinto, ICD.D, CFA  
Chief Executive Officer  
CFA Society Toronto

>>> WEBINAR

30 March 2023 | 12:00 - 1:00 pm ET

### CFA Program and Career Insights Speaker Series

30 March 2023 | 1:00 – 2:00 PM (ET)

CFA Society Toronto's Awards and University Relations Committee is pleased to invite you to join us for our first CFA Program and Career Insights' speaker series for the 2023 school year. These speaker series are an invaluable tool for students interested in learning more about the CFA Program and its application in the financial industry. This session will feature two special guests, Fred Pinto, CFA, Chief Executive Officer at CFA Society Toronto and Brian Madden, CFA, Chief Investment Officer at Frist Avenue Investment Counsel, who will share their unique insights and experiences working in the financial industry. The event will include an interactive Q&A session. [Click here to learn more and register.](#)

### University Outreach

CFA Society Toronto aims to create meaningful partnerships with local universities, colleges, and their programs through its outreach, ambassador, and sponsorship programs.

[Click here to know more about our 2022-2023 programs](#)

## CANADIAN ADVOCACY COUNCIL

When I think of March, I think of longer, warmer days as we prepare to welcome spring. It also historically continues to be a busy time for the Council and this year is no different. We recently held an in-person meeting, and it's hard to believe, but have begun discussions around planning for next fiscal year, including recruitment. Please contact us if you're interested in a discussion about potentially joining the Council.

We have filed numerous letters in response to regulatory consultations, summarized below. We also have several comment letters in progress. The work CAC continues to undertake on behalf of our stakeholders would not be possible without the efforts of our tremendous volunteers. Thank you all for your ongoing commitment.

[Click here](#) to read the February 2023 edition of the Canadian Advocacy Council Newsletter.

# OTHER INDUSTRY EVENTS

13 March 2023 | 5:30 – 7:00 PM (ET)

## **Toronto Financial Analyst Toastmasters - Open House**

In-Person Event

Are you looking to improve your speaking and leadership skills? Ace a job interview? Land a new client? Pitch a new idea to your colleagues. You've come to the right place. TFA Toastmasters is hosting an Open House for guests. Come join us and start your journey toward being a skilled speaker and leader today!

[Click here to learn more and to register](#)

23 March 2023 | 5:00 – 6:00 PM (ET)

## **CFA Societies Canada Book Launch Series:**

### ***Fool Me Once: Scams, Stories, and Secrets from the Trillion-Dollar Fraud Industry***

(Hybrid) Rotman School of Management, 105 St. George Street, Toronto + Livestream

CFA Societies Canada has partnered with Rotman School of Management at the University of Toronto to offer Canadian societies and their members access to four co-presented "book and author" events throughout the year. The third book in our current series is: ***Fool Me Once: Scams, Stories, and Secrets from the Trillion-Dollar Fraud Industry*** by Kelly Richmond Pope. In Fool Me Once, renowned forensic accounting expert Kelly Richmond Pope shows fraud in action, uncovering what makes perps tick, victims so gullible, and whistleblowers so morally righteous, while also encouraging us to look at our own behaviors and motivations in the hope of protecting ourselves and our companies.

Cost: \$43.99 +HST. Includes a copy of the book shipped complimentary post-event.

**CFA Society Toronto Member Rate: \$38.99 + HST** (email [eventregistration@cfatoronto.ca](mailto:eventregistration@cfatoronto.ca) for a promo code)

[Click here to learn more and to register](#)

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## MEMBER DISCOUNTS



### **Ripley's Aquarium of Canada**

CFA Society Toronto members get 15-20% off general admission tickets

[Click here for more details](#)



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SCIENCE  
CENTRE**

An agency of the  
Government of Ontario

### **Ontario Science Centre**

Society members receive a 20% discounted rate on tickets. Call 416-696-1000 or 1-888-696-1110 and use this discount code: 5303

[Click here for more details](#)