

**Specification of Competency Standards**  
**for the Banking Industry**  
**Unit of Competency**

Functional Area - 2a. Other Services on Enterprise Banking Operations and Support (for Large Corporations)

(Key Function – 2a.3 Investment Services Processing for Large Corporations)

Title	Develop research reports on global assets investment
Code	109243L6
Range	Formulating report to describe research findings on different kinds of global assets. This applies to the research reports offered to corporate clients with large volume of investment.
Level	6
Credit	4 (For Reference Only)
Competency	<p>Performance Requirements</p> <p>1. Knowledge in the Subject Area</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Demonstrate specialized and comprehensive knowledge in the theories and concepts related to investment, portfolio management and assets allocation by conducting comprehensive analysis on the performance of different global assets;</li> <li>• Understand the investment objectives and special requirements of corporate clients in order to structure appropriate investment strategies and present in the research reports;</li> <li>• Possess specialized knowledge in global assets investment and apply it to produce an informative research reports.</li> </ul> <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Evaluate critically the features of different global assets in order to identify factors that may affect the performance;</li> <li>• Evaluate critically the profiles (e.g. nature, size), businesses and operations of institutional clients and design customized service package to facilitate their use of the banking services;</li> <li>• Conduct research on the industry development relevant to different global assets in order to make prediction on the performance of different global assets.</li> </ul> <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Conduct analysis on the future development of different global assets and present the findings in a concise and clear manner;</li> <li>• Develop written or oral reports on investment strategies to facilitate clients' understanding and decision making in investment.</li> </ul>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• Development of research reports to specify the future trends of different global assets;</li> <li>• Production of informative investment reports based on consolidated findings from the research on macroeconomic environment, investment objectives of corporate clients and estimation of the future performance of different types of global assets.</li> </ul>
Remark	