

ANNUAL HIGHLIGHTS 大事紀要

Reporting Period: 1 April 2018 – 31 March 2019
報告期：2018年4月1日 – 2019年3月31日

The theme of this year's annual report – *Beyond Digitalisation*, firmly encapsulates our steadfast commitment to continuously deliver value beyond digital transformation, towards an enriching personal and professional developmental journey for our stakeholders.

本年度年報以「超越數碼年代、拓展嶄新天地」為主題，明確展示我們在實現數碼化後繼續提供高價值服務，助持份者促進個人及專業發展的承諾。

FINANCIAL HIGHLIGHTS 財務摘要

Pre-taxation surplus 稅前盈餘



Revenue for the year grew by **8%** primarily due to higher enrolment for examinations, while expenditure increased by **4%** on a year-on-year basis.

由於考試報考人次增加，全年總收入增長 **8%**；總開支較去年同期上升 **4%**。

BUSINESS REVIEW 業務回顧

Qualification 專業資格



1,049
Examination Sessions
考試場數



36,985
Enrolments
報考人次

In August 2018, we rolled out the Trust Training Certificate programme in partnership with Hong Kong Trustees' Association, marking it the first local professional qualification programme designed for the in-service practitioners in the trust industry.

學會於2018年8月聯同香港信託人公會推出信託培訓證書課程，成為首個為在職信託業從業員而設的本地專業資格課程。

Development Programmes 專業發展項目



1,083
Continuous Professional Training (CPT) Programmes
持續專業培訓活動



8,220
Enrolments
報名人次

On top of our long-standing lunch seminars and roundtable luncheons which feature sharing by senior industry executives, we introduced the new "Lunch & Learn" sessions in September 2018.

除了一貫由業內高級行政人員主講的午餐研討會和圓桌午餐會，學會在2018年9月再獻新猷，推出「午餐學習會」。

Our Advanced Learning Platform continues to offer a range of industry updates and technical skills courses, providing learners with the flexibility to learn anytime, anywhere and at their own pace.

學會繼續在先進學習平台上提供多元化的行業新知及專業技巧課程，方便學員不受時間和地點限制，自由調節學習節奏。

We also developed two compliance-related digital learning solutions for Hong Kong Exchanges and Clearing Limited and are working on more modules to provide market participants the flexibility to meet their on-demand learning needs.

我們同時亦為香港交易所編訂兩套以合規為主題的網上課程。我們也正編寫其他主題的網上課程，以方便市場人士按自身需要靈活進修。



Mr Ashley Alder shared reflections on the progress of Securities and Futures Commission's new approach to regulation at the HKSI Institute Roundtable Luncheon. 歐達禮先生在香港證券及投資學會的圓桌午餐會上分享對證監會的法規新方向進度的看法。



2,500
Individual
Members
個人會員



147
Corporate
Members
機構會員

We are a diverse and vibrant professional community. We engaged with our members through various activities, and one notable event is the study mission trip to Shenzhen in September 2018. The high-level delegation visited leaders in the technology-driven automotive, logistics and communication sectors to learn and exchange views on the industry's prospects and challenges.

我們是一個多元化和朝氣勃勃的專業社群，並通過各種活動，與會員互動。其中重要者為2018年9月的深圳考察團，參與的業界高層和汽車、配運及通訊行業的專家交流，並了解高科技應用對其行業前景的影響及挑戰。

In response to a member survey conducted in October 2018, we have bolstered our membership value propositions by increasing the number of free CPT eCourses for individual members from 3 CPT hours to 5 CPT hours and offered concessions to our student members to attend selected CPT courses and examinations.

就2018年10月的會員意見調查結果，學會推出了多項新舉措，以提升學會會籍的吸引力。其中包括把個人會員可以免費修讀的網上持續專業培訓(CPT)課程時數從3小時增至5小時，同時為報讀指定持續專業培訓課程及考試的學生會員提供學費及考試費優惠。

In November, we celebrated Professor KC Chan's Honorary Fellowship in recognition of his contributions and inspirational leadership towards young talent development. We also celebrated the induction of Mr Christopher Lee, Ms Phyllis Lee, Mr Victor Lee, Professor SF Wong and Ms Judith Yuen as Senior Fellows, for their contributions to the HKSI Institute and the industry.

在十一月，陳家強教授獲學會頒授榮譽資深會員頭銜，表揚他對培育後進的卓越識見和貢獻。另外，李輝敏先生、李艷蘭女士、李鴻斌先生、黃兆勳教授及袁可端女士亦因對學會及業界作出重要貢獻，獲頒授「傑出資深會員」頭銜。



(From left to right) Miss Ruth Kung, Prof SF Wong, Prof KC Chan, Mr John Maguire, Ms Judith Yuen, Ms Phyllis Lee and Mr Victor Lee at the induction ceremony for 2018 Honorary Fellow and Senior Fellows. (由左至右)：孔慶詩小姐，黃兆勳教授，陳家強教授，麥若航先生，袁可端女士，李艷蘭女士及李鴻斌先生出席2018年「榮譽資深會員」和「傑出資深會員」的頒授儀式。



27
Networking and
Member-Exclusive
Events
聯誼及會員專享活動



1,625
Enrolments
報名人次

In addition to our flagship Scholarship and Mentoring Programmes, we expanded our Young Professionals Club (YPC) initiatives through the new "Meet Our Leaders" series, enabling young members to interact and appreciate community leaders' candid sharing on their pursuits of personal and professional growth.

除了作為旗艦的獎學金計劃及師友計劃，我們亦通過新銳會推出新的「與領袖同行」系列活動，讓新世代會員接觸業界前輩，聆請教益，坦誠分享對個人及專業發展的想法。

As the implementation agent of the Pilot Programme to Enhance Talent Training for the Asset and Wealth Management Sector (WAM Pilot Programme), we expanded the eligible courses under its Financial Incentive Scheme, as well as gained support from employers to increase the internship positions and regulators to offer more educational activities in the WAM sector for the undergraduates.

作為「提升資產財富管理業人才培訓先導計劃」(資產財富管理業先導計劃)的執行代理，我們提供了更多獲專業培訓資助計劃認可的合資格課程，學會更獲得僱主及監管機構的支持，為大學本科生增加在資產財富管理業機構的實習名額和舉辦更多教育活動。



The Career Fair of the WAM Pilot Programme is one of the HKSI Institute's annual initiatives to connect undergraduates with local and international financial organisations and practitioners.

「資產財富管理業先導計劃」的職業博覽是學會為連繫本科生和本地及國際金融機構與從業員提供的其中一項年度項目。