

# Case Competition 2024

## Briefing Session to Students



- About HKSI Institute
- Introduction – Case Competition
- Feedback from Student Participants in 2023

## **Case Competition 2024**

- Eligibility
- Theme – Sustainability
- Reasons to Join Us
- Sponsors in 2024
- Programme Structure
- Timeline

## Who we are?

- ❑ A **professional membership organisation** established in 1997 by leaders in the securities and investment industry with the support of the Securities and Futures Commission (SFC).
- ❑ The HKSI Institute champions **professional standards** of excellence in Hong Kong's financial services industry and contributes to Hong Kong's role as a leading international financial centre.







## What we do?

- ❑ We offer a comprehensive programme of high quality professional **training**, **events** and **internationally recognised examinations**, and a vibrant membership community to empower individuals to achieve their professional goals.
- ❑ **Talent Grooming** is one of our focus areas. We organise **career webinars and meeting with senior executives** for future talents. Additionally, our **Qualifications Roadmap** provides a guide to competence levels and appropriate qualifications for entering the financial industry.

- **Grooming young talents** in financial industry through our signature event, Scholarship Programme, started in 2004. It was rebranded as Case Competition in 2022.
- In the past two years, ESG themed Case Competition has attracted the participation of **over 500 Student Members**. Case Competition 2023 received a **record high** level of student participation.
- Students from Higher Education Institutions (HEIs) in Hong Kong and Greater Bay Area can participate individually or as team in 2023.
- 14 Project Sponsors joined Case Competition 2023. [Company logos](#) are featured on HKSI Institute's website, publications and more.
- In Case Competition 2024, eligible students are required to **join as Teams** and **20 Project Sponsors** are recruited. Same as last year, participating students could indicate their preferred project sponsors and work on assigned research projects.

- Satisfactory feedback with positive experience were received from **Project Sponsors** and **Student Participants**:

	Project Sponsors	Student Participants
	1. Students are <b>well prepared</b> and put <b>much time</b> and <b>effort</b> on the presentations	1. Received <b>reflective comments</b> on presentation outcome from coaches
	2. Coach is very <b>impressed</b> with every team's hard work and dedication	2. Smooth completion on the research project with <b>sufficient guidance</b>
	3. <b>Quality</b> of the students' work and presentations was high.	3. <b>Valuable opportunities</b> to learn directly from their Project Sponsors
	4. The coaching sessions <b>went smoothly and effectively</b> with the support of the HKSI Institute	4. Obtained <b>invaluable insights</b> on industry experience and career development

- All student participants are **HKSI Institute Student Members** AND **full-time undergraduates** from the following Participating HEIs or nominated by selected universities in GBA

No.	HEIs in HK	No.	HEIs in HK
1	Caritas Institute of Higher Education	11	Technological and Higher Education Institute of Hong Kong, Vocational Training Council
2	Chu Hai College of Higher Education	12*	The Chinese University of Hong Kong
3*	City University of Hong Kong	13*	The Education University of Hong Kong
4	Gratia Christian College	14*	The Hang Seng University of Hong Kong
5	HKCT Institute of Higher Education	15*	The Hong Kong Polytechnic University
6*	Hong Kong Baptist University	16*	The Hong Kong University of Science and Technology
7*	Hong Kong Metropolitan University	17*	The University of Hong Kong
8	Hong Kong Nang Yan College of Higher Education	18	Tung Wah College
9*	Hong Kong Shue Yan University	19	UOW College Hong Kong
10*	Lingnan University		<b>* 2023 participants from these 11 HEIs</b>

## HEIs in GBA joined

1	The Macao Polytechnic University	3	Shenzhen University
2	The Macau University of Science and Technology	4	The University of Macau





**1**

**Cash and other awards**

**2**

**Complimentary one-year student membership or e-Credits for member ambassador**

**3**

**Engage with senior executives and gain real-world business experience**

**4**

**Ideas adopted by the Project Sponsor**



## Lead Sponsor

**Grant Thornton  
Hong Kong Limited**

## Cash Sponsors

(in alphabetical order)

1. **BDO Limited**
2. **HKFAEx Group**
3. **VCREDIT Holdings Limited**

and more...

as of 10 October 2023

## Project Sponsors

(in alphabetical order)

1. **Avenue Family Office Limited**
2. **AVISTA Group**
3. **The Bank of East Asia**
4. **BEA Union Investment Management Limited**
5. **BlackRock**
6. **Deloitte**
7. **Ernst & Young**
8. **Haitong International Securities Group Limited**
9. **HKEX**
10. **HSBC Global Asset Management (Hong Kong) Limited**
11. **KPMG**
12. **Mercer Investments (HK) Limited**
13. **Micro Connect (H.K.) Investments Limited**
14. **OKG Technology Holdings Ltd**
15. **OSL Digital Securities Limited**
16. **Prism Advisory Limited**
17. **PwC**
18. **Roma (meta) Group Limited**
19. **SF REIT Asset Management Limited**
20. **Shanghai Pudong Development Bank Co Ltd**

## Application Stage



- Join as a **team with 2-3 members** OR submit as individual to form team by HKSI Institute
- Submit **online application form and student membership application form**
- Indicate preferred sponsors

9 Oct - 20 Oct 2023

## Coaching Period



- Complete 1 sustainability research project in 1.5 months

Project Sponsors to select "Best Performer" as semi-finalists

13 Nov 2023 -  
12 Jan 2024

## Semi-final Round



- Prepare 1 sustainability case study in 3 weeks

Judges to select top 5 performers as finalists

31 Jan - 25 Feb 2024

## Final Round and Award Presentation Ceremony



- Attend **panel interview** to compete for final ranking selected by judges

The result will be announced on the same date with award presentation

21 Mar 2024

# Timeline





Click [HERE](#) to **submit your application by 20 October 2023**



### **Additional steps for Non-Student Members:**

- Click [HERE](#) to apply online **from now until 20 October 2023**.
- Please be reminded to **upload the supporting documents** that display your full name, demonstrate your "full-time undergraduates" status, and include your expected graduation year and month, suggested documents listed on the [website](#) under "How to Apply?" section.

**Quota: 100 Teams** from eligible local and GBA Higher Education Institutions

*(Due to the limited quota for students, a lucky draw will be arranged in response to the overwhelming response. Priority will be given to active student members of the HKSI Institute, and we highly recommend that you form your team with our existing student members.)*



Case Competition Team: [casecompetition@hksi.org](mailto:casecompetition@hksi.org)

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