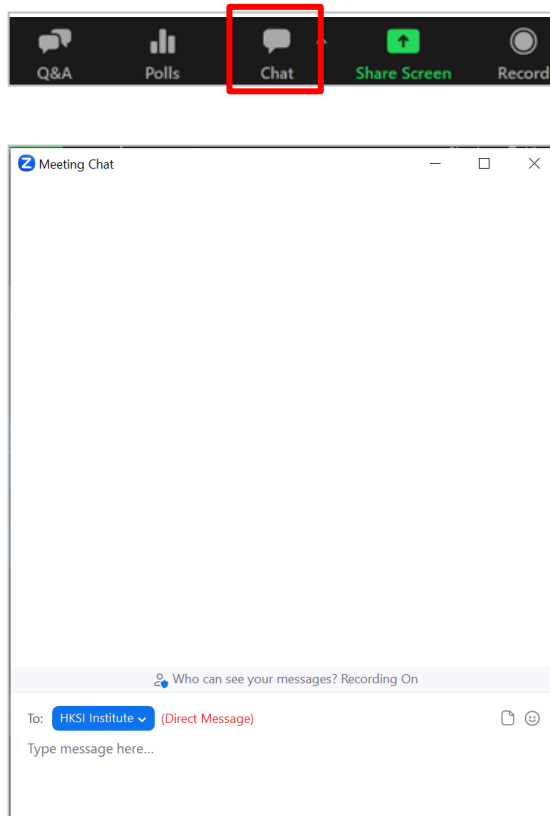


Case Competition 2025

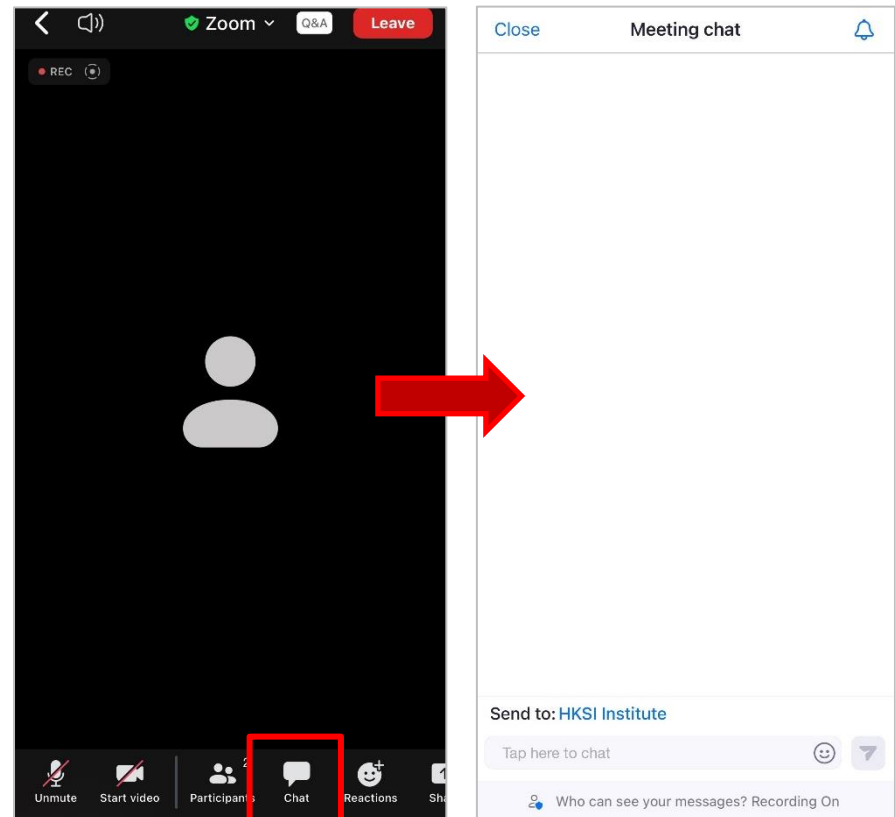
Briefing Session to Students

For Help or Queries, Use the Chat Function

Computer



Mobile/Tablet



- About HKSI Institute
- Introduction – Case Competition
- Feedback from Student Participants in 2024

Case Competition 2025

- Theme – Sustainability
 - Eligibility
 - Reasons to Join Us
 - Reward
 - Programme Structure
 - Sponsors in 2025
 - Timeline
 - Application Procedures
-
- Sharing by 2024 Awardees
 - Q&A

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 Scholarship Programme, which began in 2004 and was rebranded as Case Competition in 2022.
- Over the past three years, the ESG/Sustainability-themed Case Competition has attracted nearly 1,000 university student applications. Last year, **a record-breaking 400 students applied** for Case Competition 2024.
- Students from eligible Higher Education Institutions (HEIs) in Hong Kong and Greater Bay Area participated **in teams** since 2024 edition.
- **20 Project Sponsors** and **5 Cash Sponsors** joined Case Competition 2024. [Company logos](#) are featured on HKSI Institute's website, publications, social media, and more.

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

Project Sponsors

1. Students were very **enthusiastic and hard-working**. All of them submitted their work on time and were very **creative**, putting in a lot of effort.
2. Students were **well-prepared** and performed excellently, they submitted a set of comprehensive presentation materials and reports that were **closely related to our topic**.
3. The students did a very good job overall and their presentations were very **insightful**.
4. HKSI Institute was extremely **helpful & responded very quickly** to any questions.

Student Participants

1. The competition was an incredibly **valuable experience** for us, and the coaches' **precious feedback** helped us a lot in improving our performance.
2. The Project Sponsor brought us **new insights** into the latest trends of sustainability, we greatly appreciate their help and support.
3. We received **meaningful and constructive feedback** from our coach on the content and presentation skills.
4. This project did meet my expectations. I **learnt** both **hard knowledge** (e.g. different sustainable investing strategies) and **soft skills** (e.g. presentation skills, critical thinking).

Case Competition 2025



- All student participants must be **HKSI Institute Student Members** AND **full-time undergraduates**. The following list includes eligible Higher Education Institutions (HEIs) in Hong Kong and the Greater Bay Area (GBA) for the Case Competition 2025.
- Fluent in written and spoken English

No.	HEIs in HK	No.	HEIs in HK
1*	The Chinese University of Hong Kong	11*	The Hong Kong Polytechnic University
2*	City University of Hong Kong	12	Hong Kong Shue Yan University
3	The Education University of Hong Kong	13*	The Hong Kong University of Science and Technology
4	Gratia Christian College	14*	Lingnan University
5*	The Hang Seng University of Hong Kong	15	Saint Francis University
6	HKCT Institute of Higher Education	16	Technological and Higher Education Institute of Hong Kong, Vocational Training Council
7*	Hong Kong Baptist University	17	Tung Wah College
8	Hong Kong Chu Hai College	18*	The University of Hong Kong
9*	Hong Kong Metropolitan University	19	UOW College Hong Kong
10	Hong Kong Nang Yan College of Higher Education		* 2024 participants from these 9 HK and 3 GBA HEIs

HEIs in GBA

1	The Chinese University of Hong Kong, Shenzhen	4*	Shenzhen University
2	Macao Polytechnic University	5	Sun Yat-sen University
3*	The Macau University of Science and Technology	6*	The University of Macau

Reasons to Join Case Competition 2025 as Student Participants



Cash and
HKSI Institute eCredit
awards



Complimentary one-year
Student Membership*
(50% discount on LE Papers
and more benefits)



Interact with senior
executives to gain valuable
real-world business
experience



Ideas adopted by
the Project Sponsor or
potential internship
opportunity


*For first-time student participants in the Case Competition, subject to approval by the HKSI Institute.

Showcase Ideas & Gain Expert Feedback

Cash Award

Semi-final Stage		
Title	Number of Awardee	Prize
Best Performer	20 (1 Team from each Project Sponsor)	HKSI Institute eCredit HKD600 per student
		Cash Prize HKD1,000 per student

Final Stage		
Title	Number of Awardee	Prize
Champion	1	Cash Prize HKD12,000 per team
1st Runner Up	1	Cash Prize HKD9,000 per team
2nd Runner Up	1	Cash Prize HKD6,000 per team
Merit	2	Cash Prize HKD3,000 per team

 **Hong Kong Securities and Investment Institute**
6,029 人關注
4 週前 · 🌐

Our two winning student teams from the Case Competition 2024 showcased their innovative sustainability projects at the "Unlocking ESG: Journey into Innovations and New Frontiers" seminar, organised by Hong Kong Applied Science and Technology Research Institute (ASTRI 應科院).

At [#HKSI_Institute](#), we are committed to nurturing young talent, and delighted to see our Student Members continued their sustainability journey beyond the Competition, gaining invaluable feedback from industry professionals on this exceptional platform.

[#Undergraduates](#), get ready! Applications for the sustainability-themed Case Competition 2025 will open this October. Don't miss this excellent opportunity to learn and engage with our expert coaches, showcase your innovative ideas, and contribute to shape a sustainable future. Stay tuned!

[#CaseCompetition](#) [#Sustainability](#) [#ESG](#)

顯示翻譯



Programme Overview

1

Application Stage

- Join as a **team with 3 - 4 members** OR submit as **individual to form team** by HKSI Institute
- Submit online application form and student membership application form
- Indicate your Project Sponsor preference

2

Coaching Period

- Complete 1 sustainability **research project** in 1.5 months



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

3

Semi-final Round

- Prepare 1 sustainability **case study** in 1 month



Judges to select top 5 performers as Finalists



Final Round and Award Presentation Ceremony

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



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

7 Oct - 20 Oct 2024

18 Nov 2024 - 17 Jan 2025

24 Jan - 24 Feb 2025

3 Apr 2025 (TBC)

Lead Sponsor

Grant Thornton

5 Cash Sponsors (in alphabetical order)

Alaya Consulting

Mercer FundWatch™

VCREDIT

BDO

Trini Tsang, Wocom

2025 Project Sponsors



23 Project Sponsors are classified into six categories and listed alphabetically by company name:

Asset Management	Banking	Exchanges	Fintech/Regtech	Professional Services and Consulting	Virtual Assets and Trading Platform
BEA Union Investment	The Bank of East Asia	HKEX	BlueOnion	Alaya Consulting	OSL
HSBC Asset Management	BNP Paribas		OKG Tech	Avenue Family Office	
SF REIT Asset Management	CGS International		StashAway	AVISTA Group	
Stewart Investors	SPD Bank		Syfe	Deloitte	
				EY	
				KPMG	
				PAL Advisory	
				PwC	
				Roma (meta) Group	

Click [HERE](#) to uncover details about the Project Sponsors (company description)

Date	Events or Actions
7 - 20 October 2024	Student Application Round
7 October 2024 at 11:00am	Briefing Session to Students
12 November 2024	Matching Result Announcement of Project Sponsor
13 November 2024 at 4:30pm	Coaching Period - Briefing Session to Students
18 November 2024 - 17 January 2025	Coaching Period
22 January 2025	Result Announcement of Semi-finalists (Best Performers)
24 January 2025 at 11:00am	Semi-final Round - Briefing Session to Students
24 January - 24 February 2025	Semi-final Round
28 March 2025	Result Announcement of Finalists
3 April 2025 (TBC)	Final Round and Award Presentation Ceremony



Click [HERE](#) to **submit your application form by 20 October 2024**

Additional steps for Non-Student Members:

- Click [HERE](#) to apply online **from now until 20 October 2024**.
- 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.



The student membership is **FREE** for first-time student participants in the Case Competition for one year, subject to approval by the HKSI Institute. Please select “**Case Competition**” under “**Source of information**” to enjoy this special offer. Please read the guideline for the Student Membership Application [HERE](#) before you begin.



Quota: 115 Teams from eligible local and GBA Higher Education Institutions

- During the application process, the team leader must select **your Top 8 preferred Project Sponsors** (please read the 'company description' before making your selection) in the Case Competition Application Form.
- Teams that have submitted both Case Competition and Student Membership Application Forms with sufficient document proof, will be assigned their preferred Project Sponsors, on a **first-come, first-served** basis
- For subsequent applicants whose Top 8 preferences have been filled, we will contact your team leader and require you to choose from the remaining available Project Sponsors.

Merit Awardee:

Team: Landing Consulting (HKU)

Mr Calvin XU

Miss May XU

Project Sponsor: OSL

Champion:

Team: Tank Solutions (HKU)

Mr Sean KIM

Mr Alastair TAN

Project Sponsor: PricewaterhouseCoopers

Membership and Business Development Department:

Josephine Chin, Associate Director
Charming Chung, Manager
Wendy Ko, Senior Officer

Email: casecompetition@hksi.org

Find out more on www.hksi.org



Q&A