

CFA Institute Launches New Private Equity Certificate *Value of private equity deals in Australia jumps*

[SYDNEY, AUSTRALIA] 23 May 2024: CFA Institute, the global association of investment professionals, has launched a new Private Equity Certificate, which seeks to equip investment professionals with the skills needed to analyse private equity investments and leverage value-creation strategies, as the value of private equity investments grows in Australia.

Underpinned by globally recognised CFA Program content, the new Private Equity Certificate is tailored to private equity professionals with one to three years of experience. That includes interns, analysts and associates at private equity firms or investment banks and individuals currently pursuing related degrees.

Lisa Carroll, CEO of CFA Society Australia, said: “By offering targeted education and practical skills development, the intermediate-level certificate will offer Australian participants the expertise and knowledge necessary to thrive in working with private equity investment, which is an expanding asset class in Australia,” she said.

“As the Reserve Bank has recently reported in a new paper, [The Private Equity Market in Australia](#), the value of private equity deals involving Australian companies has increased to a record high in recent years. The total value of private equity deals was \$57 billion in 2022, almost double the value in 2021. That growth was driven by a small number of large leveraged buyouts, in which private equity firms purchased controlling stakes in an Australian company,” Carroll said.

“Australian investment professionals will be able to undertake the online program and benefit from five courses focused on practical skills, including financial modelling, and the outcomes expected of an analyst or associate in a private equity firm,” she said.

Monthly one-hour live sessions will begin in September and will be available in different time zones. After completing the following five courses, students will complete a 60-question final assessment to gain the certificate.

- Course 1: Private Markets Essentials
- Course 2: Private Equity
- Course 3: Private Debt for Private Equity Practitioners
- Course 4: Intermediate Financial Modelling
- Course 5: General Partner Perspectives

Students will be able to interact directly with a financial modelling trainer in the monthly sessions. The subject-matter expert trainers will provide help, offer clarification, guidance, and feedback on topics related to the financial modelling certificate content.



Richard Fernand, Head of Certificate Management at CFA Institute, said: “The new certificate complements the foundational level Private Markets and Alternatives Certificate launched by CFA Institute last year and offers both learning and practical content, empowering candidates with increased confidence and enhanced credibility within their organisations.

“Research interviews conducted prior to the development of the Private Equity Certificate highlighted the need for private equity content that incorporates financial modelling. This new certificate underscores the commitment by CFA Institute to providing high-quality educational content in the alternatives space. We believe that by equipping candidates with the skills, tools, and techniques demanded by the market, our suite of private market certificates will open doors for career advancement and benefit end clients,” Fernand said.

“Looking ahead, CFA Institute plans to introduce an additional private markets certificate next year, providing learners with access to advanced-level private equity modelling,” he said.

Historically, most private equity investments in Australian companies were by Australian private equity funds investing money on behalf of Australian institutional investors, such as superannuation funds. However, offshore private equity funds have increased their presence in the Australian market, according to the Reserve Bank. In 2023, offshore private equity funds accounted for around 50 per cent of the total number of investments over the year, compared with around 35 per cent in 2010. Most of that was from US private equity funds, with most of the largest deals in recent years such as the acquisitions of Sydney Airport, AusNet and Crown Resorts orchestrated by private equity funds based in the US or Canada.

For the full details of the new Private Equity Certificate details, please visit [the CFA Institute website](#).

Media Contact

Nicki Bourlioufas

Telephone: +61 786 933

nicki@spotoncpr.com

About CFA Society Australia

CFA Society Australia is part of the worldwide network of CFA Institute member societies that lead the investment profession globally by promoting the highest standards of ethics, education and professional excellence for the ultimate benefit of society. CFA Society Australia represents the interests of over 3500 investment professionals through advocacy, education, events, and professional development. For more information visit www.cfas.org.au, or follow us on [LinkedIn](#) or [Facebook](#).

About CFA Institute

As the global association of investment professionals, CFA Institute sets the standard for professional excellence and credentials. We champion ethical behaviour in investment markets and serve as the leading source of learning and research for the investment industry. We believe in fostering an environment where investors’ interests come first, markets function at their best, and economies grow. Spanning nearly 200,000 charterholders worldwide across 160 markets, CFA Institute has 10 offices and 160 local societies. Find us at www.cfainstitute.org or follow us on LinkedIn and X at [@CFAInstitute](#).