FLC QUICK START GUIDE CERTIFICATIONS

FACTSET ESSENTIALS

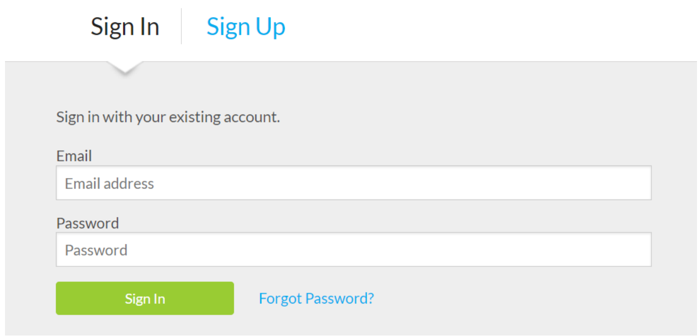
FactSet offers a free, self-paced online certification program available to all currently enrolled University of Toronto students.

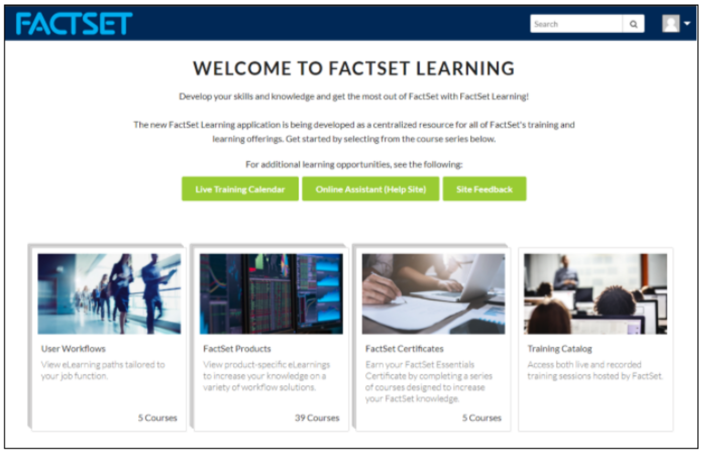
FactSet Essentials is a collection of 5 certifications that address different features and functionalities in FactSet. Students must complete multiple quizzes and a final exam to receive each module's certificate of completion - FactSet allows a maximum of 2 attempts. Students will receive a LinkedIn badge as well as a certificate upon completion.

Each module takes approximately 1-2 hours to complete, and all five modules together take approximately 4-5 hours to complete.

The 5 certificates include:

- **Core Products:** covers how to use FactSet's tools to analyze multiple asset classes.
- **Derivative Products:** covers how to monitor prices and analytics for futures, forward rates, options and various swap types, as well as download real time and historical option prices.
- **Productivity Suite:** covers how to integrate FactSet data into the Microsoft Office environment.
- **Portfolio Analysis:** covers how to use FactSet's Portfolio Analysis tool to identify what decisions drove performance.
- **Universal Screening:** covers how to develop, test and confirm investment strategies.





To register for the FactSet Essentials certificates, students must create a FactSet Learning account, which is separate from a FactSet account. Accounts can be created on the FactSet Learning website at: https://learning.factset.com/

CERTIFICATIONS

Bloomberg Market Concepts

Bloomberg Market Concepts (BMC) is a free, self-paced certification program offered online to University of Toronto students. It typically takes 8-12 hours to complete and comprises four required modules and four optional modules. **Students interested in a career in the financial markets are encouraged to complete the BMC certificate as early in their studies as possible.**

To obtain the certification, students must answer various quizzes associated with each of the four Core Concepts modules.

The Core Concepts modules comprise:

- **Economic Indicators:** focuses on how economic indicators are published and analyzed, as well as how they can be used to spot inflection points.
- **Currencies:** explores the history and mechanics of currency markets, the main drivers of currency valuation, and the role of central banks in guarding against inflation and deflation.
- **Fixed Income:** covers the fundamentals of the bond market, bond valuations, central bankers, interest rates and the yield curve.
- **Equities:** introduces users to the stock market and covers the nature of equities, equity research, absolute valuation and relative valuation.

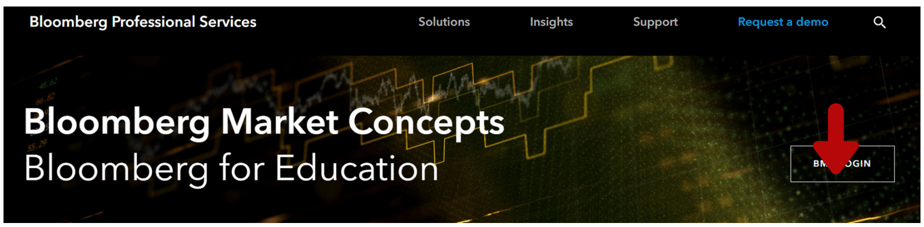
The optional modules are:

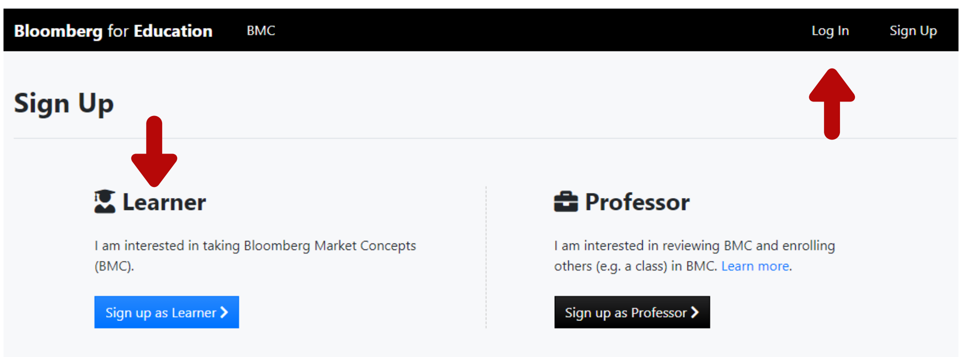
- **Terminal Basics***
- **Commodities**
- **Equity Options**
- **Portfolio Management**

*We recommend students complete the Terminal Basics module to increase their proficiency and comfort using the Bloomberg Terminal

To register for BMC:

- Visit the Bloomberg for Education portal at: https://www.bloomberg.com/professional/product/bloomberg-market-concepts/
- Click the 'BMC Login' button at the top right hand of the screen.
- Select 'Sign Up as Learner', and enter your information, using your @mail.utoronto.ca address.
- Create a password. ***Note: your BMC account is separate from your Bloomberg Terminal account.***
- Check 'No' in response to the question: 'Are you taking BMC as part of a group...'.
- Check the box after reading and agreeing to the BMC Terms of Service and select Sign Up.
- Select Login and enter your account information.
- After successfully logging in, you will jump to the Home page, and be able to start the modules.





Make sure to complete your BMC certification before your access expires. Access to BMC is only available for 1 year from the initial access date.

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