INDIVIDUAL LEARNERS / EVALUATION PACK

Choose a subject and test your understanding

A self-study worksheet for exploring a public example, explaining what changed and asking about current individual access before making a study plan.

Who to involve

Use this yourself, or bring it to your course instructor if you expect access through a class.

Choose the product around the outcome

Product	Learning focus
CapitalFIA - Fixed Income Analyzer	Understand bond prices and yields
CapitalODA - Options & Derivatives Analyzer	Separate derivative payoff from profit
CapitalPAS - Portfolio Analyzer	Explain allocation and diversification
CapitalEQA - Equity Analyzer	Challenge equity valuation assumptions
CapitalBOS - Back Office Settlement Simulator	Understand settlement evidence and controls

Facilitated trading and market experiences

For CapitalCMS - Capital Market Simulator, CapitalFITS - Fixed Income Trading Simulator, CapitalFTS - Forex Trading Simulator, or CapitalPMS - Portfolio Management Simulator, discuss availability, participant arrangements and facilitation separately.

Compare the full portfolio

TRY / OBSERVE / DISCUSS

Explain a change in equity model value

Try the fictional dividend example with a $3 next dividend and 3% perpetual growth. Compare required returns of 9% and 10%, then explain why the model value changes. Identify a company for which constant dividend growth would be a poor assumption. Suggested planning time: 25-35 minutes.

Open the public example and worked method

Run the evaluation

1. Choose one subject and write down what you want to understand.

2. Try the public two-minute example and inspect the worked method and assumptions.

3. Reproduce the baseline, change one input and explain both the change and a model limitation.

4. Ask about individual or class access, duration and support before relying on full-product availability.

Evidence to review

Understanding. You can explain the output in your own words and identify the inputs that drive it.

Limits. You can name a model limitation and distinguish an illustrative result from a forecast or investment recommendation.

Access fit. Confirm whether individual access is available, any account or class requirements and the access period.

Purchase clarity. Confirm any price, renewal or cancellation terms and available support before purchasing; this pack makes no offer.

Use fictional inputs. Suggested timing is a planning estimate, not a prescribed course duration. These website illustrations are separate from the full products.

DECISION / OPEN QUESTIONS / NEXT STEP

Prepare the next conversation

1. Which subject and prerequisite knowledge should I start with?

2. Is individual access currently available or do I need class enrollment?

3. What tools, duration, account requirements and support would access include?

4. Are there any fees or renewal terms, and what does the product not include?

Evaluation record

Product and learning outcome

Evidence observed and gaps

Decision: proceed / resolve gaps / defer

Decision owner and next review

Public website examples are available without signing in. Full-product access is confirmed separately. No certification, examination result, employment outcome or complete CFA Program preparation is promised. The products do not execute real trades or provide investment advice.

Access and commercial scope must be agreed for the selected product. This worksheet is not a license, compliance attestation or guarantee of availability.

Ask about individual access

info@capitalwave.com

Read this pack online