UNIVERSITIES / EVALUATION PACK

Evaluate the fit for your finance curriculum

A faculty and program-team worksheet for choosing a learning outcome, trying a representative activity and reviewing evidence before a wider rollout.

Who to involve

Bring the course lead, a teaching assistant or instructor, and the institutional owner of access and procurement.

Choose the product around the outcome

Product	Learning focus
CapitalFIA - Fixed Income Analyzer	Bond pricing, yield sensitivity and interest-rate risk
CapitalODA - Options & Derivatives Analyzer	Derivative payoffs, assumptions and hedging decisions
CapitalPFA - Portfolio Analyzer	Allocation, diversification and portfolio risk
CapitalEQA - Equity Analyzer	Equity valuation and sensitivity to assumptions
CapitalBOS - Back Office Simulator	Post-trade evidence, operational controls and reconciliation

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

Teach the price-yield relationship

Start with the fictional three-year bond in the CapitalFIA worked example. Ask learners to price the same cash flows at 5% and 6% yield, explain the direction of change, and distinguish exact repricing from an approximation. Suggested planning time: 30-45 minutes; adapt to course level.

Open the public example and worked method

Run the evaluation

1. Map the activity to one course outcome and state the prerequisites.

2. Inspect the public example, then ask for the corresponding full-product workflow in a demonstration.

3. Ask a representative learner to explain the result and an instructor to review the evidence.

4. Record gaps, access requirements and an agreed decision before planning deployment.

Evidence to review

Curriculum fit. Learners can connect the task to the chosen course outcome and identify its assumptions.

Evidence and assessment. Faculty can review calculations and reasoning; confirm which reports and exports the selected release actually supplies.

Teaching workflow. Inspect instructor setup, learner instructions, cohort arrangements and how feedback is reviewed.

Practical access. Check institutional devices, accessibility needs, student and instructor numbers, term dates and expected concurrent use.

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 course, learner level and prerequisite knowledge are in scope?
2. Who owns grading, learner support and access administration?
3. What instructor views, reports or exports must be demonstrated?
4. What access period, procurement review and data requirements must a proposal cover?

Evaluation record

Product and learning outcome

Evidence observed and gaps

Decision: proceed / resolve gaps / defer

Decision owner and next review

Faculty retain course design, grading and competency decisions. These materials do not claim complete CFA Program coverage or CFA Institute approval. Confirm product-specific access and capabilities before enrolling students.

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

Plan an evaluation conversation

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