

# Exam IFC Syllabus - Pass Guaranteed First-grade IFC - Latest Investment Funds in Canada (IFC) Exam Mock Exam



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You will also face your doubts and apprehensions related to the Investment Funds in Canada (IFC) Exam IFC exam. Our CISI IFC practice test software is the most distinguished source for the CISI IFC Exam all over the world because it facilitates your practice in the practical form of the Investment Funds in Canada (IFC) Exam IFC certification exam.

## CISI IFC Exam Syllabus Topics:

Topic	Details
Topic 1	<ul style="list-style-type: none"> <li>Introduction to the Mutual Funds Marketplace: This domain covers the structure of Canada's mutual fund industry, including key participants like manufacturers, distributors, and regulators, along with distribution channels and the regulatory framework governing the industry.</li> </ul>
Topic 2	<ul style="list-style-type: none"> <li>Analysis of Mutual Funds: This domain addresses evaluation tools and techniques for mutual fund performance, including quantitative measures like returns and risk metrics, and qualitative factors like manager experience and investment style.</li> </ul>
Topic 3	<ul style="list-style-type: none"> <li>Understanding Alternative Managed Products: This domain introduces investment products beyond traditional mutual funds, including ETFs, segregated funds, and hedge funds, examining their features, structures, benefits, risks, and regulatory treatment.</li> </ul>
Topic 4	<ul style="list-style-type: none"> <li>Ethics, Compliance, and Mutual Fund Regulation: This domain addresses ethical standards and regulatory requirements for advisors, covering professional conduct, compliance obligations, conflicts of interest, disclosure requirements, and rules established by regulators and self-regulatory organizations.</li> </ul>
Topic 5	<ul style="list-style-type: none"> <li>Understanding Investment Products and Portfolios: This domain explores various investment products including stocks, bonds, and securities, along with portfolio construction principles, asset allocation strategies, and how different products work together to meet client objectives.</li> </ul>
Topic 6	<ul style="list-style-type: none"> <li>Evaluating and Selecting Mutual Funds: This domain covers the systematic process of choosing appropriate mutual funds based on client needs, including selection criteria, cost considerations, performance history, and ongoing portfolio monitoring and rebalancing.</li> </ul>
Topic 7	<ul style="list-style-type: none"> <li>The Know Your Client Communication Process: This domain focuses on gathering and documenting client information to ensure suitable recommendations, including understanding financial situations, investment objectives, risk tolerance, and maintaining ongoing communication with clients.</li> </ul>

## IFC Exam with Accurate Investment Funds in Canada (IFC) Exam PDF Questions

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### CISI Investment Funds in Canada (IFC) Exam Sample Questions (Q185-Q190):

#### NEW QUESTION # 185

Danny is a Dealing Representative for Everbright Investments. He met with his client Adele, who has \$1,000,000 to invest. During their meeting Danny determines that Adele has a high-risk profile. In addition, he learns that she has an excellent understanding of equities and how volatile they can be. Danny is considering recommending growth funds specifically, and making a recommendation from the following investment options:

	5-year Annualized Returns net of MER.	MER	Sharpe Ratio
ABC Global Equity Fund	7%	1%	0.40
DEF European Equity Fund	7%	2%	0.30
LMN Asia Pacific Equity Fund	7%	3%	0.20

Based on the information provided, which mutual fund should Danny recommend?

- A. Invest equally in all 3 funds.
- B. LMN Asia Pacific Equity Fund.
- C. ABC Global Equity Fund.
- D. DEF European Equity Fund.

**Answer: A**

Explanation:

Adele has a high-risk profile and an excellent understanding of equities. Therefore, it would be appropriate for Danny to recommend growth funds. However, since Adele has \$1,000,000 to invest, it would be prudent to diversify her investments and invest equally in all 3 funds. This way, she can benefit from the exposure to different regions and sectors, and reduce the impact of market fluctuations on her portfolio. Based on the table, all 3 funds have the same 5-year annualized returns net of MER, which is 15%. However, they have different MERs and Sharpe ratios. The MER is the fee charged by the fund manager for managing the fund, and the Sharpe ratio is a measure of risk-adjusted return. A lower MER means a lower cost for the investor, and a higher Sharpe ratio means a higher return per unit of risk. Therefore, investing equally in all 3 funds would allow Adele to achieve a balanced trade-off between cost and performance. References:

Canadian Investment Funds Course (CIFIC) Study Guide, Chapter 4: Mutual Funds, Section 4.2: Types of Mutual Funds, page 4-6  
Canadian Investment Funds Course (CIFIC) Study Guide, Chapter 5: Fixed-Income Securities, Section 5.5:

Risk-Return Trade-Offs, page 5-14

Sharpe Ratio Definition - Investopedia

#### NEW QUESTION # 186

Solomon is a Dealing Representative who is excited about a new equity fund his dealer recently approved. He thinks investors will be attracted to the fund's historical performance. He has a prospective new client, Madira, who is 25 years old. Madira has invested in mutual funds before, but not with Solomon's dealer. She has made an appointment to open a new RRSP with Solomon's firm. What does Solomon need to do to make this a suitable recommendation?

- A. Rely on the risk rating of the mutual fund when offering an investment solution.
- B. Show from past fund performance, that mutual fund costs are not important if there are high returns.

- C. Identify how the proposed investment is in alignment with the investor's profile and holdings.
- D. Match the past rates of return of the mutual fund with what is the anticipated rate of return.

**Answer: C**

Explanation:

To make a suitable recommendation, Solomon needs to identify how the proposed investment is in alignment with the investor's profile and holdings. A suitable recommendation is one that meets the investor's needs, goals, risk tolerance, time horizon, and personal circumstances. It also considers the investor's existing portfolio and how the new investment would affect its diversification, performance, and risk. Therefore, option C is correct regarding what Solomon needs to do to make a suitable recommendation. The other options are not correct or sufficient to make a suitable recommendation. Option A is false because mutual fund costs are important regardless of the past fund performance, as they reduce the net returns and compound over time. Option B is false because relying on the risk rating of the mutual fund is not enough to offer an investment solution, as it does not reflect the investor's return expectations, liquidity needs, tax situation, or personal preferences. Option D is false because matching the past rates of return of the mutual fund with what is the anticipated rate of return is not a reliable way to make a recommendation, as past performance does not guarantee future results and may not be consistent with the investor's risk tolerance or time horizon.

References: [Suitability | GetSmarterAboutMoney.ca], [Mutual Fund Fees | GetSmarterAboutMoney.ca], [Risk Rating | GetSmarterAboutMoney.ca]

### NEW QUESTION # 187

What bias results in investors valuing an asset that they own over an asset that another individual owns?

- A. Status Quo
- B. Representativeness
- C. Endowment
- D. Risk aversion

**Answer: C**

Explanation:

Endowment bias leads investors to overvalue assets they own compared to similar assets they do not own. The feedback from the document states:

"People who are subject to endowment bias place more value on an asset they hold property rights to than on an asset they do not hold property rights to." Reference: Chapter 5 - Behavioural Finance Learning Domain: The Know Your Client Communication Process

### NEW QUESTION # 188

Fred's client, Matteo, holds a technology-themed mutual fund. The fund's investment objective recently changed, allowing it to hold various cryptocurrencies, resulting in a high-risk rating and making it unsuitable for Matteo. Fred discussed the change with his client, but Matteo insisted on continuing to hold the fund.

What action must Fred take?

- A. Update Matteo's risk profile so the fund is now suitable for him.
- B. Redeem the fund.
- C. Report the change to senior management.
- D. Document the client's decision to hold.

**Answer: D**

### NEW QUESTION # 189

Which of the following statements is TRUE about the movement of business cycles in the Canadian economy?

- A. A period of at least 3 consecutive months of contraction is called a recession.
- B. A period of economic expansion is always of the same length as a period of economic contraction.
- C. A period of economic expansion is of the same length in every cycle.
- D. A period of economic expansion is followed by a period of economic contraction.

**Answer: D**

### Explanation:




A business cycle is a cycle of fluctuations in the aggregate economic activity of a nation around its long-term natural growth rate. It consists of four phases: expansion, peak, contraction, and trough. A period of economic expansion is followed by a period of economic contraction, which is also called a recession. A recession is defined as a significant decline in economic activity spread across the economy, lasting more than a few months, normally visible in real GDP, real income, employment, industrial production, and wholesale-retail sales<sup>1</sup>. The other statements are not true about the movement of business cycles in the Canadian economy. The length of each phase and cycle varies depending on various factors, such as fiscal and monetary policies, external shocks, consumer confidence, and technological changes. There is no fixed rule that a period of economic expansion or contraction must last for a certain number of months or quarters. A period of at least 3 consecutive months of contraction is not sufficient to define a recession; it must also be significant and widespread across the economy. References: Business Cycle: What It Is, How to Measure It, the 4 Phases, Business Cycle - Definition, How to Measure and 6 Different Stages, Business Cycle - Definition, Phases, Graphs, Economics Examples

### NEW QUESTION # 190

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