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CISI ICWIM Exam Syllabus Topics:

Section	Weight	Objectives
Investment Management	15%	- Portfolio construction theories - Risk and return concepts - Performance measurement and evaluation - Investment strategies
Industry Regulation	10%	- Regulatory authorities and rules - Client categorization and protection - Compliance and governance - Financial crime prevention
The Financial Services Sector	16%	- Regulatory objectives and frameworks - Structure and participants - Market functions and products - Ethical standards and professional conduct
Asset Classes	10%	- Real estate and alternative assets - Cash and money market instruments - Equities - Derivatives - Fixed income securities

Investment Advice	21%	- Communication and documentation - Advisory process - Portfolio recommendations and review - Taxation principles
Fiduciary Relationships	16%	- Duties and responsibilities - Risk profiling and suitability - Conflicts of interest - Client needs assessment
Lifetime Financial Provision	18%	- Estate and succession planning - Retirement planning - Trusts and foundations - Protection and insurance planning
Economics and Investment Analysis	10%	- Macroeconomics and markets - Economic indicators and cycles - Valuation methods - Investment mathematics and statistics

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CISI International Certificate in Wealth & Investment Management Sample Questions (Q133-Q138):

NEW QUESTION # 133

Why would an investment manager conduct forward-looking security attribution?

- A. In order to establish by how much they need to outperform the benchmark
- B. To quantify next year's annual charge
- **C. To establish where future risks lie**
- D. In order to calculate future profits

Answer: C

Explanation:

Forward-looking security attribution focuses on identifying potential future risks in a portfolio by analyzing market trends, economic indicators, and security performance forecasts.

* Why is Option B Correct?

* Investment managers use quantitative models and stress testing to identify upcoming risks.

* Helps in adjusting asset allocation and implementing hedging strategies.

* Why Not Other Options?

* A (Calculate future profits) # Attribution focuses on performance breakdown, not profit forecasting.

* C (Quantify annual charge) # Fees are predetermined and not part of attribution analysis.

* D (Outperform benchmark) # Attribution measures risk sources, not outperformance targets.

Reference: CFA Institute (Performance Attribution), CISI Wealth & Investment Management.

NEW QUESTION # 134

Why do investors demand a risk premium?

- A. So that they can outperform the benchmark
- **B. To compensate them for accepting additional risk**

- C. To cover the expenses of the fund manager
- D. To cover the tax payments on profitable trades

Answer: B

NEW QUESTION # 135

Central banks:

- A. Set mortgage rates
- B. Guarantee the success of individual businesses
- C. Are responsible for individual bank lending decisions
- **D. Act as lender of last resort**

Answer: D

Explanation:

A core function of a central bank is to support financial stability, including acting as lender of last resort to the banking system. This means that when a solvent bank or financial institution faces a temporary liquidity shortage and cannot obtain sufficient funding from normal market sources, the central bank may provide emergency liquidity to prevent the problem escalating into a wider loss of confidence, bank runs, or systemic disruption. This role is distinct from day to day commercial decisions. Central banks do not guarantee the success of individual businesses, and they do not make lending decisions for individual banks, which remain responsible for credit underwriting and risk management. Central banks influence the level of interest rates in the economy through policy rates and monetary operations, but they do not directly set mortgage rates, which are determined by banks based on funding costs, competition, risk, and policy expectations. For CISI purposes, the cleanest and most examinable statement is that central banks act as lender of last resort, alongside their broader responsibilities for monetary stability and supporting the payment and banking system.

NEW QUESTION # 136

During a period of growth in consumer income the demand curve for a normal product would:

- A. Remain static
- **B. Shift to the right**
- C. Begin to curve upwards
- D. Shift to the left

Answer: B

NEW QUESTION # 137

What term is used to describe a situation where clients give investment instructions to a firm without being given advice to do so?

- A. Non-discretionary
- B. Discretionary
- **C. Execution only**
- D. Robo-advice

Answer: C

Explanation:

Execution-only refers to situations where clients make investment decisions without receiving advice from the firm. The firm's role is limited to executing the client's instructions, without providing recommendations or assessing suitability.

Key features:

The firm does not offer advice.

The client takes full responsibility for their investment decisions.

Reference:

ICWIM, Topic: Types of Investment Advice and Regulatory Frameworks.

FCA Handbook, Conduct of Business Sourcebook (COBS).

NEW QUESTION # 138

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