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Die Prüfungsmaterialien zur CISI IFC Zertifizierungsprüfung von ZertPruefung ist unvergleichbar. Sie sind extrem echt und richtig. Um den Kandidaten zum Bestehen der CISI IFC Prüfung zu verhelfen, hat unser IT-Eliteteam immer noch Untersuchungen gemacht. Die Produkte von ZertPruefung sind nicht nur real, sondern auch kostengünstig. Wenn Sie unsere Prüdunkte wählen, können Sie einen einjährigen kostenlosen Update-Service bekommen. Sie können sich genügend auf die CISI IFC Prüfung vorbereiten und den Stress überwinden. Das ist wirklich eine gute Wahl.

Wenn Sie eine gute Lernwebsite suchen, die Ihnen hilft, die IFC Prüfung zu bestehen, ist ZertPruefung die beste Wahl. Per ZertPruefung können Sie die Spitzenfertigkeiten in der IT-Branche meistern und die CISI IFC Zertifizierungsprüfung leicht bestehen. Es ist allen bekannt, dass diese Prüfung schwer zu bestehen ist. Und die Erfolgsquote für die Prüfung ist sehr niedrig. Aber Sie können geeignete Lernhilfe und Fragen und Antworten zur CISI IFC Zertifizierungsprüfung von ZertPruefung wählen. Diese Schulungsunterlagen sind nicht nur vollständig, sondern umfasst auch viele Wissensgebiete. Ihre Ähnlichkeit mit den echten Prüfungen ist sehr hoch. Das wird von der Praxis bewiesen. Wenn Sie die CISI IFC Zertifizierungsprüfung bestehen wollen, wählen Sie doch ZertPruefung. Ganz richtig!

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### CISI IFC Prüfungsplan:

Thema	Einzelheiten
Thema 1	<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>
Thema 2	<ul style="list-style-type: none"><li>The Modern Mutual Fund: This domain examines mutual fund structures, types, and operations, covering equity, fixed income, balanced, and specialty funds, their legal structures, pricing mechanisms, purchase processes, and associated fees.</li></ul>
Thema 3	<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>
Thema 4	<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>
Thema 5	<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>

### CISI Investment Funds in Canada (IFC) Exam IFC Prüfungsfragen mit Lösungen (Q48-Q53):

#### 48. Frage

Xian-Li believes she is a sophisticated investor. She has constructed her own portfolio and has had some success. She does not believe in studying a company's details such as earnings, expenses, or assets. She is more concerned with patterns in a company's stock price over time. She believes patterns form and can be used to predict future movements in the market.

How does Xian-Li evaluate the companies in her portfolio?

- A. fundamental analysis
- B. value analysis
- C. flowchart analysis
- D. technical analysis

**Antwort: D**

Begründung:

Technical analysis is the method of evaluating securities by analyzing the statistics generated by market activity, such as past prices and volume. Technical analysts do not attempt to measure a security's intrinsic value, but instead use charts and other tools to identify patterns that can suggest future activity. Xian-Li is using technical analysis to evaluate the companies in her portfolio.

#### 49. Frage

Your clients, Jessica and Ken, want to buy a house next year. You recommend a money market fund. How do you think a money market fund will help Jessica and Ken reach their goal?

- A. Money market funds provide investors a guaranteed fixed rate of return.

- B. Money market funds are safe investments because their net asset value per unit does not usually fluctuate.
- C. Money market funds provide high returns without risking the capital invested.
- D. Money market funds pay income weekly which can be automatically reinvested.

**Antwort: B**

Begründung:

Money market funds are safe investments because their net asset value per unit does not usually fluctuate. Money market funds invest in highly liquid instruments like high-interest savings accounts, term deposits, short-term debt securities, cash equivalents, and other low-risk, short-term investments<sup>3</sup>. These funds aim to preserve capital and provide liquidity while generating some income<sup>3</sup>. Money market funds typically have a stable net asset value per unit (NAVPU) that does not change much over time<sup>3</sup>. The other statements are false. Money market funds do not provide high returns without risking the capital invested. Money market funds offer low returns that may not keep up with inflation or meet long-term investment goals<sup>3</sup>. Money market funds also have some risks, such as credit risk, interest rate risk, and liquidity risk<sup>3</sup>. Money market funds do not pay income weekly which can be automatically reinvested. Money market funds may pay income monthly, quarterly, semi-annually, or annually, depending on the fund's distribution policy<sup>3</sup>. Investors can choose to receive cash distributions or reinvest them in more units of the fund<sup>3</sup>. Money market funds do not provide investors a guaranteed fixed rate of return. Money market funds do not guarantee any return or principal amount<sup>3</sup>. The return of money market funds depends on the interest rates and yields of the underlying investments, which may vary over time<sup>3</sup>.  
References: 7 Best Money Market ETFs in Canada 2023: Cash And HISA ETFs, Best Money Market Funds in Canada | WOWA.ca, 3 Best Canadian Money Market Funds (2023) - PiggyBank

### 50. Frage

Over the course of a couple of weeks and several appointments, Harold was finally able to provide an investment solution for his new client, Felicia. It was a lump sum investment where they plan to see her money grow for the next 5 years. With regards to Know Your Client (KYC) requirements, what are Harold's responsibilities moving forward?

- A. There are no other responsibilities for Harold to fulfill until the time horizon has been reached for this investment solution.
- B. Within 36 months of the implementation of the investment, Harold must review the KYC to ensure it is current.
- C. Monitor investment performance to determine if the investment solution is on track to satisfy Felicia's financial needs.
- D. KYC does not need to be revisited or revised until there is a need to conduct additional trades for Felicia's account.

**Antwort: C**

Begründung:

Know Your Client (KYC) requirements are ongoing obligations that advisors must fulfill to ensure that they provide suitable recommendations and services to their clients. KYC requirements include collecting and documenting information about the client's personal and financial situation, investment objectives, risk tolerance, and investment knowledge. KYC requirements also include monitoring and updating the client's information and investment performance on a regular basis. According to the Mutual Fund Dealers Association of Canada (MFDA), advisors must review the KYC information at least once every 36 months, or more frequently if there are any material changes in the client's circumstances or needs<sup>1</sup>. Advisors must also monitor the investment performance of the client's portfolio and compare it with the client's expectations and goals. If the investment performance is not satisfactory or consistent with the client's risk tolerance, advisors must take appropriate actions, such as rebalancing the portfolio, switching funds, or revising the investment strategy<sup>2</sup>. Therefore, Harold's responsibility moving forward is to monitor the investment performance of Felicia's lump sum investment and determine if it is on track to satisfy her financial needs for the next 5 years. He must also review her KYC information at least once every 36 months, or sooner if there are any changes in her situation or objectives. References:

\* MFDA Bulletin #0756-P - Know-Your-Client and Suitability<sup>1</sup>

\* MFDA Bulletin #0760-P - Monitoring of Investment Performance<sup>2</sup>

### 51. Frage

Sujay contributes 3% of his \$60,000 salary to his employer's defined contribution pension plan. His employer contributes the same amount to the plan. How will this affect his registered retirement savings plan (RRSP) contribution room for the year?

- A. It will reduce Sujay's contribution room by \$1800
- B. It will reduce Sujay's contribution room by \$3,600.
- C. It will have no effect. RRSP contribution room is based on earned income only.
- D. It will reduce Sujay's contribution room by 51,800.

**Antwort: B**

#### Begründung:

D is correct because Sujay's registered retirement savings plan (RRSP) contribution room for the year will be reduced by \$3,600. This is because his employer's defined contribution pension plan is considered a registered pension plan (RPP), which affects his RRSP contribution room through a pension adjustment (PA).

The PA is calculated as 18% of his earned income in the previous year minus his RPP contributions in the current year. In this case, Sujay's PA for the current year is \$3,600, which is 18% of his \$60,000 salary minus his 3% contribution (\$1,800) and his employer's 3% contribution (\$1,800). The PA reduces his RRSP contribution room for the next year by the same amount. It will have an effect on his RRSP contribution room (A), as it is not based on earned income only, but also on RPP contributions. It will not reduce his contribution room by \$51,800 (B), as this is more than his earned income. It will not reduce his contribution room by \$10,800 (C), as this is 18% of his earned income without subtracting his RPP contributions.

#### 52. Frage

Which stock would be considered the most defensive?

- A. ISS Technology with a beta of 1.5
- B. KYX Manufacturing with a beta of 1.0
- C. ABC Bank with a beta of 0.5
- D. Unity Corp with a beta of 2.0

#### Antwort: C

#### Begründung:

Beta measures systematic (market) risk:

Beta = 1.0 # moves with market.

Beta < 1.0 # less volatile, more defensive.

Beta > 1.0 # more volatile, aggressive.

Defensive stocks (e.g., banks, utilities) typically have low betas.

Given options:

0.5 (A) = least risky, most defensive.

2.0 (B) = highly aggressive.

1.0 (C) = average risk.

1.5 (D) = above-average risk.

#### 53. Frage

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Machen Sie Sorge um die IFC von CISI Prüfung, weil Sie nur noch ein Anfänger sind? Von jetzt an wird ZertPruefung alle Probleme für Sie lösen. Die Lernhilfe von CISI IFC Zertifizierung sind umfassend und enthalten unterschiedliche Ziele, daher können sogar die Anfänger sie leicht erfassen. Sie würden den Schlüssel für den Durchlauf der IFC Prüfung haben und Selbstsicherheit gewinnen, wenn Sie solche Lernhilfe haben. Dann warum warten Sie noch?

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