

International Introduction to Investment

What is the International Introduction to Investment?

This qualification provides a comprehensive introduction to the financial services industry with a specific focus on investments from a global perspective. It is the first step in the CISI's qualification pathway, and it is taken by many practitioners as it is the foundation exam for higher level CISI qualifications.

The qualification covers key financial principles and products including assets and markets, equities, bonds, derivatives, investment funds, retirement planning, loans, mortgages and life assurance.

It explores the broader economic environment in which the financial services industry operates and looks at how economic activity is determined and managed in different economic and political systems. This qualification offers a first introduction to financial services regulation focusing on financial crime, insider trading and market abuse, and provides candidates with an understanding of ethical behaviour and acting with integrity.

Who should study the International Introduction to Investment?

It is intended for new entrants and staff who are beginning their career in the financial services industry. The broad topics covered make the qualification suitable for all staff, not just those responsible for making investment decisions, including administration, finance and accounting, IT, customer service, sales and marketing and HR and training.

Key features

- **A comprehensive entry-level qualification** – provides a detailed overview of investment and industry terminology from a global perspective
- **First step in the CISI's qualification pathway** – can be taken as a stand-alone qualification or as part of the Investment Operations Certificate (IOC)
- **Ideal for induction purposes** – can be integrated into induction programmes to ensure a benchmark level of understanding amongst all employees
- **Free CISI Student membership** - become associated with a Chartered professional body and take advantage of an extensive range of benefits

Accredited by

Syllabus Summary

The IOC is completed by successfully passing any three units from the following categories:

- Introduction
- Economic environment
- Financial assets and markets
- Equities
- Bonds
- Derivatives
- Investment funds
- Financial services regulation
- Other financial products

Studying for the International Introduction to Investment

80 hours of study is recommended for this exam. You can choose to self-study for the exam using the CISI workbook and elearning or have formal training with one of our Accredited Training Partners (ATP). To find an ATP near you visit, [cisi.org/atp](https://www.cisi.org/atp)

The CISI's workbook policy requires, where available, the most up-to-date CISI workbook to be purchased when booking an exam, including by an ATP on your behalf. This applies to all candidates sitting CISI exams in the UK (includes Northern Ireland, Guernsey, Jersey and Isle of Man). Candidates sitting CISI exams outside of the UK will receive the most up-to-date workbook for that subject in PDF format and this is included in the international exam price.

MyStudy

The CISI has a variety of tools and information available to help you in the preparation for sitting your exam. You can find sample papers, study tips and exam information - all located in one place, visit [cisi.org/mystudy](https://www.cisi.org/mystudy)

Assessment

The International Introduction to Investment is assessed via a one-hour exam consisting of 50 multiple-choice questions. The pass mark for the exam is 70%.

The exam is delivered by Computer Based Testing (CBT). A worldwide network of test centres is available, ensuring flexible scheduling, instant results and ease of completing the exam on screen. Visit [cisi.org/cbt](https://www.cisi.org/cbt) to find your nearest venue.

Book your exam

Online – [cisi.org/iintro](https://www.cisi.org/iintro)
 By phone – +44 20 7645 0777
 Via email – customersupport@cisi.org

Don't forget to set your results preferences afterwards at [cisi.org/resultsdashboard](https://www.cisi.org/resultsdashboard)

Visit [cisi.org/prices](https://www.cisi.org/prices) for current prices

Next steps

CISI Membership

If you successfully complete the International Introduction to Investment you will be eligible for Affiliate membership of the CISI. Membership enables you to develop your career, increase your competence and maintain the highest standards of personal integrity. The programme of free professional benefits assists you to keep up to date with the industry. Visit [cisi.org/membership](https://www.cisi.org/membership)

Further CISI qualifications

Completing this foundation qualification will give you access to further CISI qualifications including the full Investment Operations Certificate (IOC). Visit [cisi.org/ioc](https://www.cisi.org/ioc)