

**PUBLIC REPORT
APRIL 2018**

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INTRODUCTION

The World Investor Week (WIW) is an initiative of the International Organization of Securities Commissions (IOSCO) that was conceived to raise awareness about the importance of investor education and protection. The project, organized and implemented by IOSCO's Committee 8 on Retail Investors (C8), consists of up to a week of outreach activities carried out by participating IOSCO member jurisdictions. A key objective of the WIW is to highlight the importance of investor education and protection, including in resource-constrained jurisdictions.

By using the IOSCO network to facilitate a coordinated and, therefore, a more powerful approach, the WIW also provides a framework for individual jurisdictions to publicize their investor education and protection initiatives and to deliver more tailored messaging within their jurisdictions.

In October 2017, IOSCO, with the support of other organizations, carried out a pilot edition of WIW and achieved encouraging results that exceeded the initial goals. Due to the impact of the pilot project, the IOSCO Board decided to launch a second WIW in October 2018.

THE WORLD INVESTOR WEEK

World Investor Week is a week-long, global campaign promoted by IOSCO to raise awareness of the importance of investor education and protection and to highlight the various initiatives of securities regulators in these two critical areas. From 2-8 October 2017, IOSCO securities regulators and other IOSCO members on six continents undertook a range of activities, such as offering investor-focused information and services, promoting contests to increase awareness of investor education initiatives, organizing workshops and conferences, and conducting local/national campaigns in their jurisdictions.

WIW 2017 had two primary objectives, namely (i) to disseminate key messages that support investor education, investor protection and financial literacy; and (ii) to foster learning opportunities for investors.

The pilot also aimed at strengthening collaboration among IOSCO members on investor education and protection initiatives, and raising IOSCO's visibility among key international stakeholders.

At the international level, the pilot edition had the following set of objectives (and goals):

- achieving considerable participation of IOSCO members (at least 40); and
- engaging international organizations/forums in the campaign (minimum of 2), by enlisting supporters that endorse the campaign and/or promote events and activities.

IOSCO members also were encouraged to set their objectives and goals at the local level.

Local members conducted the work in each jurisdiction, and determined the scope and timing of their participation. Only non-commercial activities were permitted and all information was required to be unbiased, with no recommendations made on specific investment products or services.

Non-members were allowed to participate if invited to do so by an IOSCO member. At the national level, self-regulatory organizations, industry associations and market participants, as well as non-governmental organizations (NGOs) were allowed to participate, at the discretion of each jurisdiction.

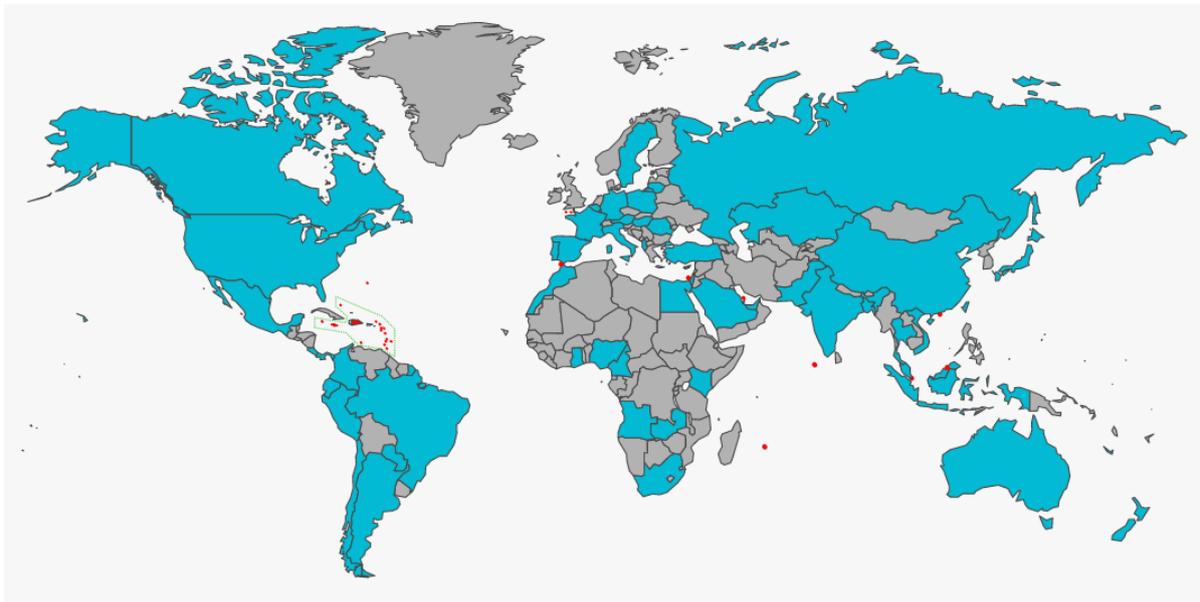
Internationally, IOSCO engaged with other organizations wishing to endorse or participate in WIW.

Third parties were barred from supporting the WIW financially, and were required to follow rules laid down in the implementation plan if they wished to take part in the campaign.

WIW 2017 RESULTS

IOSCO asked national coordinators of WIW to fill in an online survey. The results presented in this section are based on the survey responses. In addition, national coordinators were expected to prepare a public report on the campaign in their jurisdictions. The local public reports are part of this Public Report.

On the map below, the jurisdictions in blue are those that participated in the 2017 WIW.



Participating jurisdictions of WIW 2017. Source: <http://www.worldinvestorweek.org/participants.html>

Table 1 – WIW 2017 in numbers

Press coverage	100 million people
WIW 2017 successfully disseminated key messages	94.45% of respondent jurisdictions agree
WIW 2017 successfully fostered learning opportunities for investors	90.57% of respondent jurisdictions agree
IOSCO jurisdictions	73
Non-IOSCO jurisdictions	9
Webinars, classes, talks, lectures, town meetings, seminars or conferences	573, reaching 883,329 people
Guided tours, visits or similar activities	64, reaching 81,043 people
Press releases and newspaper articles	802, reaching 110 million people

Interviews, TV shows and radio programs	134, reaching over 72 million people
Books, booklets, leaflets, flyers or other publications	2,590, with a print run of almost 1.2 million copies
Games, software, apps and other electronic materials	628, with 4.5 million downloads
Websites	103
Website hits	351,271
Page views	172,991
Total number of visits	711,589 (90,403 different visitors)
Organizations	813
Overall level of investor satisfaction with WIW	83.33% (40.74% very satisfied and 42.59% satisfied)
International organizations/forums	6 (G20, World Bank, IFIE, IDB, OECD and INFO Network)

The national coordinators from every reporting jurisdiction indicated their interest in participating in the WIW 2018 edition.

SUPPORTERS

The original goal was to win the support of at least two international organizations/forums for the campaign, but WIW 2017 surpassed all expectations by attracting six. The G20, the World Bank, the International Forum for Investor Education (IFIE), the Inter-American Development Bank (IDB), the Organisation for Economic Co-operation and Development (OECD) and the International Network of Financial Services Ombudsman Schemes (INFO Network) embraced the pilot project, showing the world that financial education matters and must be taken seriously.

G20

The Group of Twenty (G20) is the premier forum for its members' international economic cooperation and decision-making. Its membership comprises 19 countries plus the European Union. G20 leaders meet annually. In addition, Finance Ministers and Central Bank Governors meet regularly during the year to discuss ways to strengthen the global economy, reform international financial institutions improve financial regulation and implement the key economic reforms that are needed in each member economy.

World Bank

The World Bank is a vital source of financial and technical assistance to developing countries around the world. It is not a bank in the ordinary sense but a unique partnership to reduce poverty and support development. The bank provides low-interest loans, zero to low-interest credits, and grants to developing countries. These support a wide array of investments in such areas as education, health, public administration, infrastructure, financial and private sector development, agriculture, and environmental and natural resource management. Some of its projects are cofinanced with governments, other multilateral institutions, commercial banks, export credit agencies, and private sector investors.

IFIE

The International Forum for Investor Education — IFIE — is a unique alliance chartered in 2005 that brings together private sector and public sector providers of investor education to improve the effectiveness of investor education programs around the world. The Forum serves as a clearinghouse for the exchange of information and ideas among providers of investor education from different jurisdictions, including organizations that are just developing or planning to develop investor education programs.

IDB

The Inter-American Development Bank works to improve the lives of people in Latin America and the Caribbean. Through financial and technical support for countries working to reduce poverty and inequality, it helps improve health and education, and advance infrastructure. IDB's aim is to achieve development in a sustainable, climate-friendly way. The Bank's current focus areas include three development challenges – social inclusion and inequality, productivity and innovation, and economic integration – and three cross-cutting issues – gender equality and diversity, climate change and environmental sustainability, and institutional capacity and the rule of law.

OECD

The mission of the Organisation for Economic Co-operation and Development (OECD) is to promote policies that will improve the economic and social well-being of people around the world. The OECD provides a forum in which governments can work together to share experiences and seek solutions to common problems. It works with governments to understand what drives economic, social and environmental change. Currently, the OECD is focused on helping governments around the world to restore confidence in markets and in the institutions behind them; return public finances to health as a basis for future sustainable economic growth; foster and support new drivers of growth through innovation, environmentally friendly 'green growth' strategies and the development of emerging economies; and assist people of all ages to develop the skills to work productively and enthusiastically in the jobs of tomorrow.

INFO Network

The International Network of Financial Services Ombudsman Schemes (the INFO Network) is the worldwide association for financial services ombudsmen — independent and impartial out-of-court schemes and offices that resolve complaints brought by consumers (and, in some cases, small businesses) against banks, insurers and/or other financial services providers. Formalized in 2007, the INFO Network facilitates co-operation among its members to build expertise in external dispute resolution by exchanging experiences and information in areas such as scheme/office structures, functions and governance models; scheme/office codes of conduct; use of information technology; handling of systemic issues; cross border referral of complaints; and staff training and continuing education.

INTERNATIONAL EVENTS

FPSB's World Financial Planning Day

In addition to all the supporting organizations above, the Financial Planning Standards Board (FPSB), an IOSCO member, promoted the World Financial Planning Day, as part of the activities of World Investor Week. The event was intended to support consumers in achieving their financial and life goals and to increase consumers' level of financial literacy and capability. On World Financial Planning Day, FPSB and its network of member organizations, representing a global community of over 170,000 Certified Financial Planner professionals, provided programs to promote consumer awareness and understanding of financial planning topics, including debt management; preparing for an unexpected financial emergency; home ownership; building savings; investment planning; and preparing for retirement.

IOSCO Asia Pacific Hub

In March 2018, IOSCO launched the IOSCO Asia Pacific Hub in Kuala Lumpur, hosted by the Securities Commission (SC) Malaysia. This initiative responds to a growing demand among IOSCO members for enhanced capacity building, particularly in growth and emerging markets. The need to enhance regulatory capacity is intensifying, given an increasingly complex market environment, growing financial and technological innovation and rapidly expanding cross-border activity. These circumstances pose challenges for regulators, increasing the need for IOSCO members to strengthen their regulatory expertise and hone their ability to oversee and supervise markets.

The Hub, in conjunction with IOSCO's World Investor Week 2017, held its inaugural two-day workshop on Leveraging Behavioural Economics for Investor Education and Investor Protection on 3-4 October 2017. The program reviewed the fundamental principles behind behavioural economics and the application of behavioural insights to the design of specific interventions in the context of securities markets and to evaluate such interventions. This workshop was offered at no cost to IOSCO members and was aimed at mid to senior-level executives. Participants in the workshop – both within and outside the region – showed significant interest in the subject. Due to the interactive and hands-on nature of the workshop, participation was restricted and with 31 participants from 20 different jurisdictions the program was fully booked.

HOW TO PARTICIPATE

WIW 2018 will again take place during the first week of October, with participating jurisdictions having the flexibility to organize their activities around this week. Organizations interested in joining WIW can contact the national coordinator in their jurisdiction. A full list of participating jurisdictions and lead organization in each one is available online at <http://www.worldinvestorweek.org/participants.html>.

A website for WIW (www.worldinvestorweek.org) contains useful information for participating jurisdictions and supporting organizations, including press releases and the WIW Implementation Guide.

ABOUT IOSCO

The International Organization of Securities Commissions (IOSCO) is the international body that brings together the world's securities regulators and is recognized as the global standard setter for the securities sector. IOSCO develops, implements and promotes adherence to internationally recognized standards for securities regulation. It works intensively with the G20 and the Financial Stability Board (FSB) on the global regulatory reform agenda.

IOSCO believes the need for investor education and financial literacy has never been greater than today. As the financial marketplace continues to evolve and innovate, investment products are becoming increasingly complex and financial services increasingly diverse. Retail investors require a greater understanding of key financial concepts to comprehend and evaluate the choices available to them and to avoid financial fraud. Strengthening investor education and financial literacy programs also is essential at a time when responsibility for saving and investing for retirement is shifting from the employer to the individual in many jurisdictions.

In response to these challenges, the IOSCO Board approved the establishment of the Committee 8 on Retail Investors in June 2013. The Committee's primary mandate is to conduct IOSCO's policy work on retail investor education and financial literacy. Its secondary mandate is to advise the IOSCO Board on emerging retail investor protection matters and conduct investor protection policy work as directed by the IOSCO Board. Annex I shows the C8 structure.

WIW is an IOSCO initiative coordinated by Committee 8 with the support of IOSCO's General Secretariat. Committee 8 established a WIW Working Group¹ to take the project forward and to act as regional coordinators.

The General Secretariat, in turn, is the point of contact for all IOSCO members, committees and task forces, and is responsible for the day-to-day functioning of IOSCO.

1. Members of the working group include: CVM Brazil and US SEC (co-chairs), CNBV (Mexico), CNMV (Spain), CNV (Argentina), CONSOB (Italy), CSRC (China), FSA (Japan), IFSA (Indonesia), ISA (Israel), US FINRA, JSDA (Japan) and SC (Malaysia).

The Secretary General and the Deputy Secretary General manage and coordinate the Secretariat's work, and perform duties of high-level representation with institutions such as the Financial Stability Board (FSB), the Basel Committee on Banking Supervision (BCBS), and the Committee on Payments and Market Infrastructures (CPMI). They also provide support to members and ensure the smooth and effective functioning of the Board, the Growth and Emerging Markets Committee, the Affiliate Members Consultative Committee, the regional and policy committees and the task forces. The Secretary General and his deputy seek to ensure transparency, inclusivity and accountability throughout the organization. They engage regularly with political and industry representatives.

CONTACT:

<http://www.worldinvestorweek.org/contact.php>

REPORTS OF JURISDICTIONS



WORLD INVESTOR WEEK 2017

National Coordinator: María Geandet

IOSCO member: Comisión Nacional de Valores de Argentina

Other participants:

1. ACINDAR PYMES SGR
2. Asociación de Bancos Argentinos (ADEBA)
3. Asociación de Bancos de la Argentina (ABA)
4. Asociación de Bancos Públicos y Privados de la República Argentina (ABAPPRA)
5. Banco de Córdoba S.A. (Bancor)
6. Bolsa de Comercio Confederada (BCC)
7. Bolsa de Comercio de Bahía Blanca S.A. (BCBB)
8. Bolsa de Comercio de Buenos Aires (BCBA)
9. Bolsa de Comercio de La Plata
10. Bolsa de comercio de Mar del plata (BCMP)
11. Bolsa de Comercio de Rosario (BCR)
12. Bolsas y Mercados Argentinos S.A. (BYMA)
13. Caja de Valores S.A.
14. Cámara Argentina de Fondos Comunes de Inversión (CAFCI)
15. Cámara de Agentes de Bolsa
16. CUYO AVAL SGR
17. Estrategias y Negocios S.R.L. (No es AGENTE REGISTRADO ante la CNV)
18. Fundación UADE – Universidad Argentina de la Empresa
19. Guillermo Fernando Williams (Agente Productor de Agentes de Negociación CNV – Persona Jurídica N° 670)
20. Instituto Argentino de Ejecutivos de Finanzas (IAEF)
21. Instituto Argentino de Mercado de Capitales (IAMC)
22. Mar del Plata Bursátil S.A. (Agentes de Liquidación y Compensación y Agentes de Negociación - Propio N° 140)
23. Mercado a Término de Buenos Aires S.A. (MATBA)
24. Mercado a Término de Rosario S.A. (ROFEX)
25. Mercado Abierto Electrónico S.A. (MAE)

26. Mercado Argentino de Valores S.A. (MAV)
27. Pontificia Universidad Católica Argentina Santa María de los Buenos Aires (UCA)
28. PORTFOLIO S.A. (Agente Productor de Agentes de Negociación CNV – Persona Jurídica N° 493)
29. S&C INVERSIONES S.A.
30. San Juan Bursátil S.A. (Agentes de Liquidación y Compensación y Agentes de Negociación - Propio N° 342)
31. Universidad CAECE – Cámara Argentina de Comercio y Servicios
32. Universidad de Palermo (UP)
33. Universidad Nacional de Córdoba – Facultad de Ciencias Económicas
34. Universidad Nacional de Cuyo (UNCUYO) – Facultad de Ciencias Económicas (FCE)
35. Universidad Nacional de La Plata – Facultad de Ciencias Económicas (FCE)
36. Women Corporate Directors (WCD)

During WIW 2017, the Securities and Exchange Commission of Argentina (CNV) coordinated 36 activities in 12 cities carried out by 36 different institutions, including all capital market actors, stock exchanges, brokers, Universities and associations.

The activities were aimed at high school and University students, young professionals and entrepreneurs. They were publicized through the website developed by the CNV for this event and the dissemination made by the participating institutions through: graphic communications media, radio programs, e-mails to contacts of the institutions, social networks (Twitter, Facebook, Instagram, LinkedIn, YouTube), newsletter and posts, own web pages and sponsors' web pages, press releases to specialized media and virtual flyers sent to key people or personalized invitation to schools.

The day of the launch of WIW 2017 the CNV carried out two types of activities, one with the participation of institutional investors and the other including talks, games and videos for 500 high school students. We would like to stress that it was possible to access to this knowledge and information, presented in seminars, workshops, talks and conferences given by market specialists, and educational videos via online.

The CNV highlighted the following topics: "Capital Market: Meaning, Functions and Role", "Types of Investment Instruments", "How to participate in the Capital Market like an investor and as an issuer", "Financing for SMEs", "Protection of retail investors and the increasing women's participation in finance".

The in-person activities were attended by 3.800 people and the online activities, including the social networks, were viewed by more than 400.000 people. The publications in the newspapers were aimed at around 5.000.000 people.

Surveys indicate that WIW 2017 successfully disseminate throughout Argentina key messages promoting the education and protection of investors, financial literacy and offered learning opportunities.

The participating institutions agreed that the WIW was an excellent initiative to increase awareness of the capital market as an alternative source of investment.













CÁMARA DE AGENTES DE BOLSA

Cámara de Agentes de Bolsa
12 suscriptores [SUSCRIBIRSE](#)

[PÁGINA PRINCIPAL](#) [VIDEOS](#) [LISTAS DE REPRODUCCIÓN](#) [CANALES](#) [ACERCA DE](#) [Q](#)

¿Qué es un Agente de Bolsa?
146 vistas · Hace 1 mes
Federico Spraggon Hernández - Presidente de la Cámara de Agentes de Bolsa





WORLD INVESTOR WEEK 2017

National Coordinator: Australian Securities & Investments Commission (ASIC)

Other IOSCO members:

Other participants:

ASIC's MoneySmart website: ASIC's MoneySmart homepage promoted the '[Invest Smarter](#)' webpage (see attached website screengrab). The webpage was ASIC's MoneySmart's second most popular feature that week with 177 clicks.

ASIC's MoneySmart investing content was viewed over 12,000 times, with the following pages being the most popular content:

- Smart ways to invest \$10,000;
- Investor toolkit;
- Build your wealth;
- Make tax work for you;
- Investing challenge.

ASIC's MoneySmart Tips (eNewsletter): Our invest smarter article was the second most popular item for October with over 1,050 clicks.

Media release: ASIC issued a media release on 3 October: [17-331MR World Investor Week: ASIC's MoneySmart golden rules to investing](#). "To mark World Investor Week (2 – 8 October 2017), ASIC is reminding investors to work out their financial goals and develop an investment plan before committing to an investment...ASIC's MoneySmart website offers practical tips for investors". To read more: <http://asic.gov.au/about-asic/media-centre/find-a-media-release/2017-releases/17-331mr-world-investor-week-asics-moneysmart-golden-rules-to-investing/>

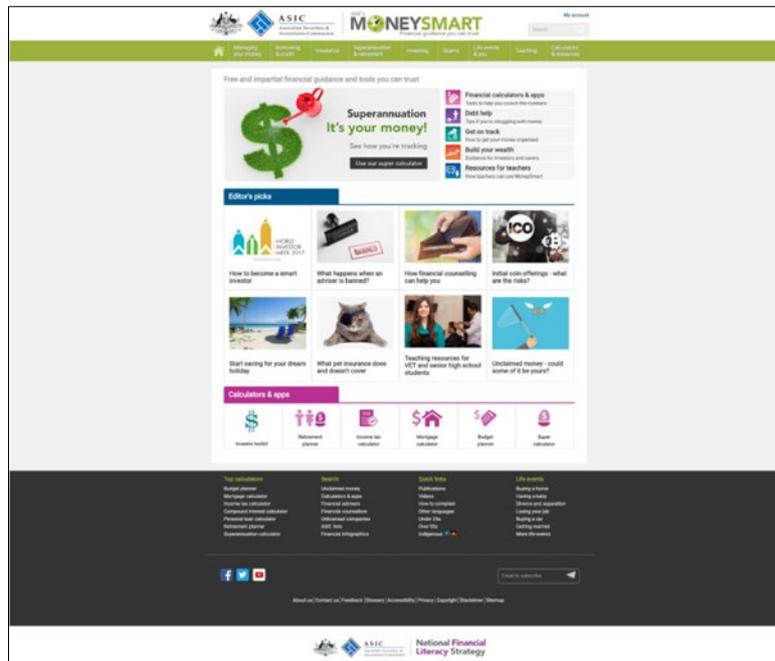
Social media: ASIC's MoneySmart shared a number of posts on Facebook and Twitter during the week, highlighting the golden rules of investing.

The social posts included information on:

- Working out your financial goals and allocating a time frame to achieve each goal;
- Deciding how much risk you're comfortable with;
- Knowing the signs of an investment scam;
- Using diversification to manage investment risk;
- Watching out for get rich quick schemes;
- Making sure your money is working hard for you;
- Using our investor toolkit to build your investor profile.

The social posts reached over 64,000 people and generated more than 2,000 engagements with our content. A sample of Facebook and Twitter posts is provided below.

On Twitter, our 'Golden rules of investing' posts generated over 30,000 impressions and over 650 engagements with our content.



To celebrate World Investor Week (2-8 October) we are encouraging our Facebook community to become smart investors. Every day this week will be posting tips to put you on the path to smart investing.

Our 1st golden rule of investing is:

Work out your financial goals and allocate a time frame to achieve each goal. Ideally you will have at least one financial goal in mind, however smart investors think about short, medium and long-term goals. To find out more read our tips on financial goal setting.



Goals & risk tolerance | ASIC's MoneySmart

Want to learn more about investment risk and investment goals? Visit ASIC's MoneySmart website to work out what investments are right for you.

MONEYSMART.GOV.AU

To celebrate World Investor Week (2-8 October), we've been sharing our golden rules of investing to encourage you to become a smart investor.

Our 6th golden rule is: Make sure your money is working hard for you.

Our article explains how can you get the most from your savings, whether it's reducing debt, creating an emergency fund or starting an investment portfolio.




Money SmartTeam @MoneySmartTeam

Our last golden rule of investing for #WIW2017: Don't rely on luck. Develop a plan with our investor toolkit
<https://www.moneysmart.gov.au/investing/invest-smarter/investor-toolkit> ...
pic.twitter.com/w5VhrOvmev



Money SmartTeam @MoneySmartTeam

Our 1st golden rule of investing for #WIW2017: Work out your financial goals & allocate a timeframe to achieve them
<https://www.moneysmart.gov.au/investing/invest-smarter/goals-and-risk-tolerance> ...
pic.twitter.com/fgxKOhQmDI



WORLD INVESTOR WEEK 2017

National Coordinator: Securities Commission of The Bahamas

Other IOSCO members: N/A

Other participants: N/A

SCB conducted several activities in celebration of World Investor Week (WIW) to raise awareness about SCB's role as regulator of the capital markets, and to disseminate pertinent investor education and protection messages.

Proclamation from the Prime Minister, Dr. The Hon. Hubert A. Minnis, declaring the week 2-8 October 2017 in The Bahamas "Investor Education Week"

The Prime Minister issued a proclamation designating the week of 2-8 October 2017 "Investor Education Week" to bring about awareness of and sensitise the public to the importance of investor education and to support the SCB's investor education efforts during WIW. The proclamation was published in the local newspapers and on SCB's website and Facebook page. During the month of October, the Proclamation was viewed on Facebook by approximately 10,500 people in The Bahamas. The newspapers estimate circulation of around 18,000 people throughout the archipelago, which has a population of around 390,000.

Launch of pilot programme and study on enhancing financial literacy and investor education through the national curriculum

SCB partnered with the Ministry of Education (MOE) to launch a pilot programme and study for enhancing financial literacy and investor education through the national curriculum. The pilot began during the first week of October and aims to provide students with skills to develop sound financial practices and manage their money. Financial literacy and investor education curricula were developed for students at both the primary and junior high school levels.

The pilot is being conducted in three schools in Nassau: A.F. Adderley Junior High School, H.O. Nash Junior High School and C.W. Sawyer Primary School. The high school curriculum focuses on nine core areas including understanding money; basic numeracy for financial literacy; planning for financial success; saving; introduction to investing; the capital markets; risk and diversification; getting advice and avoiding frauds and scams. The primary school curriculum covers more fundamental areas and focuses on basics such as understanding money and saving.

The pilot programme/study will run for the remainder of the 2017-2018 school year and includes both pre and post evaluations administered to study and control groups to assess the pilot's success. The long-term aim is to improve delivery of financial literacy and investor education through the national school curriculum.

“Invest in You!” video competition

The SCB launched a video competition under the theme “Invest In You!” targeting young people between the ages of 15-25. The competition started at the beginning of WIW and ends on 9 November. The aim of the competition is to raise awareness of financial literacy and investor education among young people by having them develop video presentations to inform their peers, by way of peer-to-peer learning, about saving and investing.

SCB promoted the competition through print media, Facebook and word of mouth. Representatives of the Bahamas International of Chartered Accountants (BICA), the Bahamas CFA Society and a leading communications and branding consultant are serving as judges. These representatives were chosen as judges for the purpose of deepening relationships with these associations and organizations.

Persons had the option of entering the competition alone or as a group of up to three. Judges will select one entry for the grand prize of an Ipad Pro 10.5 inch. All entries will also be eligible for a People’s Choice award which is \$100 worth of phone minutes. The entries will be placed on SCB’s Facebook page and the entry with the most likes will be awarded the People’s Choice award. These prizes will be awarded on 30 November 2017.

SCB participated with other jurisdictions through the International Forum for Investor Education (IFIE) Americas Working Group in launching comparable video competitions for WIW.



Invest in You!
[VIDEO Competition]

Competition begins : 2nd October 2017 and
ends 2nd November 2017

GRAND PRIZE
Ipad Pro 10.5in model
for up to 3 persons each

People's Choice award:
\$100 BTC phone card/Aliv credit
for up to 3 persons each

Visit www.scb.gov.bs/videocompetition.html
for entry form and official rules

Launch of social media presence

SCB launched its official social media presence on 2 October using Facebook.

SCB also made use of Facebook advertising to boost the reach of its content. During WIW, the SCB used WIW press kit resources to generate posts on key WIW messages.

As of this report, SCB's posts during the month of October had a total reach of 44,232 people in The Bahamas (out of a population of about 390,000). The link to SCB's page is www.facebook.com/securitiescommission.bah.

Investor education and protection video

SCB launched the first of a series of investor education and protection videos on Facebook on 6 October. The "Can you spot a pyramid?" video shared key tips including red flags and other information that will better equip the public to identify and avoid investment pyramid schemes. The video reached 26,500 people in The Bahamas (of a population of about 390,000) and approximately 12,000 people watched it. The second video in the series "Are you struggling to save?" provided tips and motivators to encourage saving. The video reached 10,862 people with approximately 5,300 views.

Can you spot a pyramid?

[\(www.facebook.com/securitiescommission.bah/videos/1967731193507149/\)](http://www.facebook.com/securitiescommission.bah/videos/1967731193507149/)

Are you struggling to save?

www.facebook.com/securitiescommission.bah/videos/1976058756007726/

Enhancement of investor education section of SCB website

SCB enhanced access to investor education information and resources available on its website during WIW. Sections were created in the investor education portion of the website (www.scb.gov.bs) for “frauds and scams”, and “saving and investing” with the information appearing directly on the website versus through publications on the website. Persons now have easier access to the material via this method.

Distribution of investor education material at a local mall

Arrangements were made with a local mall for SCB to distribute investor education material on 7 October. SCB distributed approximately 400 copies of its “Tips to avoid frauds and scams” book along with 375 copies of its “Making your money grow” book. SCB chose to do this activity as it allowed it to reach and directly share its investor education message with a wide cross section of the public.



Media releases

SCB issued several press releases in relation to WIW to generate buzz around the campaign locally and to communicate the events happening during the week. The following press releases were issued:

- SCB celebrates World Investor Week
- SCB launches “Young Investors, Creative Expressions” video competition
- Financial literacy and investor education pilot study launches in public schools

These can be found on SCB’s website www.scb.gov.bs.

WORLD INVESTOR WEEK 2017

National Coordinator:

Other IOSCO members:

Other participants:

Bangladesh Securities and Exchange Commission (BSEC) has successfully and gorgeously observed the 'World Investor Week 2017' during October 2-8. All the associated organizations were immensely cooperative and actively participated in the week-long program. As per IOSCO guideline, the program was mainly for retail investors and we got huge responses from their end in terms of participation as well as enthusiasm. Bangladesh capital market is mainly dominated by retail investors. The percentage of retail investors is quite high in comparison with any other capital market of the world. In addition, as BSEC has started its Nationwide Financial Literacy Program since January 2017, we can undoubtedly say that this initiative of IOSCO has a countable impact on the capital market of Bangladesh and its investors.

BSEC arranged a press conference on 28 September 2017 to highlight the week-long program. Around 80(eighty) print, electronic and online media attended the press conference. The program initiatives and theme were widely circulated by them through newspapers, online papers and TV channels.

On October 01, 2017 BSEC published a Special Supplement in 3(three) widely circulated newspapers of the country. The total circulation of the papers is 1.06 million. The President, Prime Minister, Finance Minister, Economic Affairs Adviser to Prime Minister, Finance and Planning State Minister, Senior Secretary of Financial Institution Division, Finance Ministry, Chairman, Bangladesh Securities and Exchange Commission and Secretary General of IOSCO have given their valuable speeches in the Supplement. His Excellency President of Government of People's Republic of Bangladesh in his speech said, from its inception, BSEC is working for the protection of the investors. He also hoped that investors will be benefited immensely through observance of the World Investor Week 2017. The Hon'ble Prime Minister of Government of People's Republic of Bangladesh said, International Organization of Securities Commissions (IOSCO) has announced to celebrate the World Investor Week across the globe, which will eventually help to promote greater investor education. A souvenir with some write ups and pictures of our activities has also been published in order to observe this week.

Mr. Abul Maal Abul Muhith, MP, Hon'ble Finance Minister, Government of People's Republic of Bangladesh has inaugurated the "World Investor Week 2017" on October 2, 2017. This was followed by a rally in Dhaka and in other divisional cities. Around 1500 people participated in the rally in Dhaka City and 1500 people participated in rally in other divisional cities as well. At the inauguration program, BSEC announced Mr. Shakib Al Hasan, Number 1 Cricket all-rounder of the world [as per International Cricket Council (ICC) ranking] as Brand Ambassador of BSEC for "World Investor Week 2017" and also the Nationwide Financial Literacy Program.

In the inauguration ceremony, the Hon'ble Finance Minister asked investors of the stock market to know, understand and analyse the market before investing money.

BSEC Chairman Dr. M. Khairul Hossain said it is a matter of joy that all stakeholders of Bangladesh capital market are actively participating in the World Investor Week program of IOSCO with 81 countries of the world. He also hoped IOSCO will announce such program in future to create awareness among investors across the world.

Brand Ambassador of BSEC, cricketer Shakib Al Hasan said: “When I was in London county cricket, I saw many of the players studied in their leisure hours. I asked them what they were studying, and many of them told me they were learning how to invest in the stock market. That is how investors in our country should proceed.”

A theme song was specially prepared for the week and it was very popular among the investors. The song emphasized on the main topic of the week i.e. “Investor Education and Protection”.

Meeting, Workshop, Seminar etc. regarding Investor education and Protection at Dhaka and other divisional cities were arranged by different stakeholders, professional bodies and universities on October 3, 6 & 7, 2017.

On October 4 & 5, 2017 and 5 October 2017 BSEC arranged two days long conference for the retail investors which were divided into 4(four) sessions. Simultaneously, an Investor Education Fair was organized for the said period. Around 40 stakeholders participated in the fair.

The day 1 conference was inaugurated by Dr. Mashiur Rahman, Economic Affairs Adviser to the Prime Minister. Dr. Rahman expressed his appreciation to BSEC for organizing week long program for the retail investors which he believes will be definitely beneficial in future.

The day 2 conference was inaugurated by Mr. M A Mannan, State Minister, Ministry of Finance and Planning, Government of People’s Republic of Bangladesh. While giving his valuable speech he said, investors should enter the capital market with proper knowledge about investment and risk. The following topics were covered during the conference;

- Investor Education and Protection
- Investment and Associated Risk
- Different Products and Sectors of Investment
- Capital Market and Economy: Role of Investors

Separate key note papers were presented and panel discussions were held during the sessions. A large number of investors participated in the conference and they actively took part in the question & answer sessions.

Apart from that, several live talk shows in different TV channels were broadcasted during the week. BSEC Commissioners, BSEC Spokesman and other market participants participated in the talk shows.

On 8 October 2017, a closing ceremony on overall discussion of week –long activities was arranged by BSEC. All the stakeholders attended the program and sincerely expressed their gratitude as they felt honored to be a part of such huge activity.

Chairman, BSEC also expressed his gratefulness to all who were associated with this weeklong program and made this event a truly successful one.



WORLD INVESTOR WEEK 2017

National Coordinator: Financial Services and Markets Authority (FSMA)

Other IOSCO members:

Other participants:

The Financial Services and Markets Authority (FSMA), as vice chair of IOSCO and as a member of IOSCO Committee 8 on Retail Investors, has actively supported the first edition of World Investor Week (WIW). At the start of the week, a press release was published on the FSMA website and on social media to announce WIW. Throughout the week, the logo of the WIW was permanently visible on the homepage of the FSMA website. At the end of the week, the FSMA published another press release announcing the success of the first edition of WIW.

In the framework of the WIW, the FSMA organized, together with the Belgian Financial Forum, a conference with high-level speakers. The theme of the conference was “Financial literacy: a global, European and Belgian challenge”. The conference took place on October 3rd in the auditorium of the National Bank of Belgium and was attended by approximately 200 persons.

The first speaker at the conference was Mr. Paul Andrews, the secretary general of IOSCO. Mr. Andrews addressed the global importance of financial education and protection, the activities of IOSCO in that field and the key messages of World Investor Week. Mr. Andrews highlighted amongst other things some of the current projects of IOSCO Committee 8 on Retail Investors.

The second speaker was Mr. Steven Maijoor, the chair of the European Securities and Markets Authority (ESMA). He elaborated on the European dimension of the financial education and the broader role of ESMA regarding retail investor protection.

Mr. Jean-Paul Servais, the chairman of the Belgian Financial Services and Markets Authority (FSMA), vice chair of IOSCO and chairman of IOSCO’s European Regional Committee, was the third and final speaker at the conference. Mr. Servais spoke on the initiatives taken in Belgium in the field of financial literacy, and more specifically on Wikifin.be, the program for financial education of the FSMA.







WORLD INVESTOR WEEK 2017 - BRAZIL

National Coordinator: Comissão de Valores Mobiliários (CVM)

Other IOSCO members: B3, Anbima

Other participants: Chamber of Deputies, Federal Senate, IBGC, Mackenzie, Instituto Federal de Educação, Ciência e Tecnologia do Sul, Sicredi, S&P, Federal University of Rio de Janeiro (UFRJ), Unifor, Unisul, Faculdades Londrina, Mattos Filho, Apimec, PUC, Brazilian Air Force, Planejar, SESC, Faculdade Salesiana, Gestão Financeira Criativa, Senac, State University of Maringá, Military Police, TCE, Fecap, UFPE, UneB, UFMG, FUCEMA, UFES, Univale, Fatec,

In the World Investor Week 2017, the Securities and Exchange Commission of Brazil (CVM) consolidated a total of 79 events (10 online and 69 face-to-face events). 1901 people attended the face-to-face events, while the online ones reached an audience of 29,600 people. 22 of the face-to-face events were organized by CVM, the national coordinator of the 2017 WIW. B3 and Anbima, affiliate members of IOSCO, and several other institutions engaged in the initiative in Brazil.

Chamber of Deputies, Federal Senate, IBGC, Mackenzie, Instituto Federal de Educação, Ciência e Tecnologia do Sul, Sicredi, S&P, Federal University of Rio de Janeiro (UFRJ), Unifor, Unisul, Faculdades Londrina, Mattos Filho, Apimec, PUC, Brazilian Air Force, Planejar, SESC, Faculdade Salesiana, Gestão Financeira Criativa, Senac, State University of Maringá, Military Police, TCE, Fecap, UFPE, UneB, UFMG, FUCEMA, UFES, Univale and Fatec, institutions not affiliated to IOSCO, participated in the 2017 WIW with many events throughout the country.

Daniel, a Business Administration student who attended one of the events held at CVM, said "As a college student, I found it highly beneficial because we had experts from the market with a lot of experience to impart to us. They were very concise and open to hear everybody's opinions. It was a terrific opportunity to learn."

Marcelo, administrator, pointed out "To me it was a cool, very productive week, with super interesting lectures about the Market. As an investor, I liked it very much and recommend you participate in the next year."

The cities of Rio de Janeiro, São Paulo, Brasília, Belo Horizonte, Recife, Vitória, Teresina, Campinas, Osasco, Viamão, Carlos Barbosa, Tubarão, Londrina, Maringá, Barreiras, Caxias and Ivaiporã hosted face-to-face events.





WORLD INVESTOR WEEK 2017

National Coordinator: Autoriti Monetari Brunei Darussalam

Other IOSCO members:

Other participants: Brunei Darussalam Capital Market Association and Financial Planning Association of Brunei Darussalam.

The Autoriti Monetari Brunei Darussalam collaborated with industry associations such as the Brunei Darussalam Capital Market Association and Financial Planning Association of Brunei Darussalam to promote investment literacy and strengthen product knowledge to the public. This was in the form of competitions such as a video competition on “what is a stock exchange and how it works”, an investment awareness challenge on the radio, and an infographic competition on financial planning.



WORLD INVESTOR WEEK 2017

National Coordinator: THE FINANCIAL MARKETS COMMISSION OF CAMEROON

Other IOSCO members:

Other participants:

The 2017 edition of World Investor Week (WIW) announced on June 28th by IOSCO, was celebrated in Cameroon under the auspices of the Financial Markets Commission (FMC) from the 2nd to the 8th of October. It was an opportunity to educate investors on the role of the Commission especially with regards to the protection of savings invested in securities. For the FMC, an associate member of IOSCO since March of 2017, this event was in tune with the strategic objective of rebuilding confidence in the marketplace inscribed in its 2017-2020 strategic plan. The activities of information dissemination, training and outreach which took place during the WIW were all designed to meet the needs of market participants.

On October 2nd, at GICAM, the headquarters of Cameroon's employers union, a conference was organized on the theme "PROTECTING INVESTORS FOR A DYNAMIC FINANCIAL MARKET" and it brought together academics, researchers and professionals in the areas of capital markets, finance, investment and legal. The opening ceremony was graced with the presence of the Minister Delegate for Finance of the Republic of Cameroon, Mr. ELUNG Paul Che.

The debates on this day were centered on the following four topics:

- 1) Which investment product for which Investor;
- 2) Corporate governance and Investor protection;
- 3) Rights and obligations of investors in securities;
- 4) Tax advantages when investing in securities.

The president of the FMC in the person of Mr. Jean Claude Ngbwa, in his opening remarks, underscored that the purpose of the WIW was among other things to create an environment of trust, keep an open door to investors seeking information regarding investing in the market, and to highlight some of the tax advantages available to all investors.

The Minister Delegate of Finance, Mr. ELUNG Paul Che in his speech emphasized on the fiscal incentives that government has made available for all those who would use the capital markets for their investments. He also announced that the government will encourage many companies in which it is a shareholder to join the capital market by undertaking IPOs. Furthermore, he reassured investors that government will continue with its bond issuance program to strengthen market development especially the market for corporate bonds. In conclusion, he encouraged public and private companies present to take advantage of the market.

On October 3rd, a workshop was organized to sensitize the economic and financial press on the functions of the financial market. This occasion brought together more than twenty members of the press and other stakeholders.

The theme of the event was “The Media and Financial Literacy in Cameroon: What Information and for which Audience? This theme was subdivided into three topics:

- 1) The Political and Social Functions of Financial Education;
- 2) Financial Information that creates Value;
- 3) The fundamentals of Stock Market Press Review.

Events in Cameroon continued all through the week with media activities sponsored by the FMC via public and private radio and television stations. Here, staff of FMC gave further information and justification for the organization of World investor week across the globe.

EXTRACTS FROM WORLD INVESTOR WEEK IN CAMEROON



**Mr. ELUNG Paul Che,
Minister Delegate – Ministry
of Finance during WIW**

“To build better and stronger markets in Cameroon, the government is here, through my voice, to reiterate its unflinching support to the capital market community and to remind our investors that Government will always do whatever it takes to ensure

that they are adequately protected. Already, through government support, a number of mechanisms to guarantee savings in the banking sector have been put in place at the level of the Central Bank. But also, we continue to encourage banks and other finance companies to issue more shares to raise equity capital in order to reduce leverage and render our financial system more secure. I am confident that investors in Cameroon’s capital markets would not hesitate to purchase bank stocks if they were to make public offerings and list their shares on the Douala Stock Exchange”.



**Mr. Jean Claude NGBWA,
Chairman FMC during WIW**

"A memorable day. The FMC, like the more than 180 other regulatory bodies around the world and members of the International Organization of Securities Commissions, has devoted this moment to reflect on the protection of investors within the framework of managing the growth our financial market. This emphasis underscores the importance of investors in the

development of our financial market through their investment activities in the stock market or when they fund their investments through the sale and purchase of securities. This is why the FMC has organized this event for the first time, with high-level intellectuals, financial specialists, jurists, and financial market players, and investors, including multinational and local companies. In fact, all citizens who are already investors and those wishing to become investors have here been convened".



WORLD INVESTOR WEEK 2017

National Coordinator:

Other IOSCO members:

Other participants:

La Superintendencia de Valores y Seguros (SVS) de Chile organizó entre el 2 y 8 de octubre de 2017 la primera Semana Mundial del Inversionista 2017 (World Investor Week, WIW) impulsada mundialmente por IOSCO, y en la cual participaron en forma simultánea, 82 países.

En Chile, la SVS organizó y promovió una serie de actividades dirigidas especialmente a inversionistas retail y estudiantes universitarios, con el **objetivo principal** de aumentar y fomentar su conocimiento financiero y difundir los mensajes claves promovidos por IOSCO, para WIW.

La SVS estableció además, como objetivos específicos:

- Difundir los productos y plataformas de educación financiera de la Institución: los sitios www.svs.cl; www.svseduca.cl y el boletín de educación financiera.
- Fomentar un mayor reconocimiento de la comunidad universitaria respecto del rol de la SVS- Comisión para el Mercado Financiero (CMF).

Para ello la Superintendencia realizó una campaña de difusión a través de distintos medios de comunicación y redes sociales; se realizaron un total de 11 charlas, realizadas en ocho universidades y en la Bolsa de Comercio de Santiago. Seis de ellas en Santiago y cinco en regiones. A estas actividades acudieron un total de 687 asistentes y se recibieron y procesaron 356 encuestas de valoración.

Campaña de difusión a través de medios de comunicación y redes sociales

Durante WIW la Superintendencia envió dos comunicados de prensa informando la realización y actividades de la Semana Mundial del Inversionista, así como la difusión de 10 consejos para que las personas puedan aprender a invertir, los cuales fueron publicados en distintos medios de comunicación.

A esto se sumó la programación y emisión de 5 entrevistas al Superintendente de Valores y Seguros, Carlos Pavez, en distintas plataformas mediáticas: Televisión abierta, televisión online, radios y uno de los principales portales informativos de Chile.

De esta manera, el Superintendente dio entrevistas en los siguientes medios de comunicación: Canal de TV abierta Mega, Canal de TV online Emol TV, Portal informativo Emol, Radio ADN y Canal 13 Radio, llegando a una audiencia aproximada de 1.164.000 personas.

Igualmente se realizó difusión en redes sociales a través de reconocidas figuras públicas, asociaciones gremiales (Asociación de Fondos Mutuos y Asociación de Aseguradores de Chile), y la red Universia, que llega a la red de estudiantes universitarios de Chile (a través de newsletter y twitter).

Charlas a estudiantes e inversionistas retail

Durante WIW la SVS organizó 11 charlas (6 en Santiago y 5 en regiones) realizadas en 8 universidades y en la Bolsa de Comercio de Santiago. El Superintendente de Valores y Seguros, Carlos Pavez, realizó 4 charlas, en las universidades Alberto Hurtado, Católica y Adolfo Ibáñez y en la Bolsa de Comercio de Santiago.

A estas actividades asistieron un total de 687 asistentes y se recibieron y procesaron 356 encuestas de valoración que incluía preguntas cuantitativas y cualitativas.

En los **resultados cuantitativos**:

- El 81,7% de los estudiantes declaró que la actividad le ayudó, satisfactoria o muy satisfactoriamente, a mejorar sus conocimientos al momento de invertir.
- 96,1% opinó de igual forma respecto de la necesidad de continuar realizando actividades de educación financiera a las personas.
- 71,3% manifestó que luego de la charla visitaría los sitios SVS y SVSEduca para tener más información sobre las inversiones.

El 69% de los estudiantes participó con **respuestas cualitativas**, de los cuales el 93% valoró positivamente esta actividad. El 71% destacó positivamente los conceptos y orientación entregada sobre inversiones.

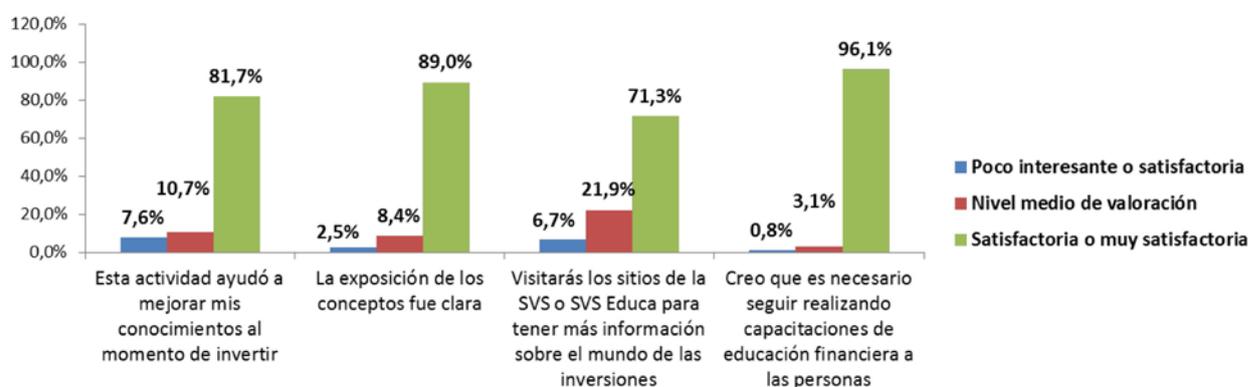
En Santiago se realizaron 6 actividades, a las que acudieron 360 asistentes:

- Universidad Católica: 37 estudiantes.
- Universidad Adolfo Ibáñez: 57 estudiantes
- Universidad Alberto Hurtado: 102 asistentes.
- Universidad de Los Andes: 29 estudiantes.
- Universidad Finis Terrae: 65 estudiantes.
- Bolsa de Comercio de Santiago: 70 asistentes (estudiantes e inversionistas retail).

Asimismo, se realizaron 5 charlas y seminarios en distintas ciudades del país, en 3 universidades, a un total de 327 estudiantes, en las siguientes universidades:

- Universidad de Valparaíso: 68 estudiantes.
- Universidad de Los Lagos, sede Puerto Montt: 33 estudiantes.
- Universidad de Los Lagos, sede Osorno: 38 estudiantes.
- Universidad del Bío-Bío, sede Concepción: 146 estudiantes.
- Universidad del Bío-Bío, sede Chillán: 42 estudiantes.

Resultados consolidados Universidades		total encuestas 356				
Elige la opción que te parezca más adecuada, teniendo en cuenta que 1 es el "grado más bajo de satisfacción o acuerdo" y 5 el "grado más alto de satisfacción o acuerdo".						
	Escala de menor a mayor valoración	1	2	3	4	5
Esta actividad ayudó a mejorar mis conocimientos al momento de invertir		8	19	38	103	188
La exposición de los conceptos fue clara		2	7	30	105	212
Visitarás los sitios de la SVS o SVS Educa para tener más información sobre el mundo de las inversiones		9	15	78	120	134
Creo que es necesario seguir realizando capacitaciones de educación financiera a las personas		3	0	11	36	306



Difusión a través de portales web y boletín de educación financiera:

Para la Semana Mundial del Inversionista la SVS creó una sección, destacada en la portada del sitio web institucional, con información de WIW:

- Programa de actividades.
- Entidades participantes.
- Folleto descargable con "[10 Consejos prácticos para aprender a invertir](#)".
- Charla del Superintendente Carlos Pavez en las universidades.
- Sitio para canalizar inscripciones al Boletín de Educación Financiera de la SVS.
- Link al sitio www.svseduca.cl
- Portada especial de WIW en sitio www.svseduca.cl

Durante WIW el portal www.svseduca.cl registró un total de 28.342 visitas, lo que representa un alza de 556% respecto del número promedio de visitas que dicho sitio registró hasta esa semana en 2017 (5.099).

Por su parte, el portal institucional, www.svs.cl observó durante WIW un aumento de 17,1% en el número promedio de visitas semanales, respecto a igual periodo del año anterior (la meta era 10%).

Durante WIW, el número de vistas a la página web del Boletín de Educación Financiera registró un total de 505 visitas, lo que representa un alza de 673% respecto de las 75 visitas semanales que en promedio, observaba dicho sitio a esa fecha durante 2017. Las suscripciones al Boletín subieron durante la semana en 8,3% (la meta era 10%).

Finalmente, la SVS participó con un stand informativo de WIW en la IV Feria de Educación Financiera que se realiza en octubre, Mes de la Educación Financiera en Chile, a la que asistieron aproximadamente 2.500 estudiantes de edad escolar.

Otros participantes:

- Bolsa de Comercio de Santiago.
- Superintendencia de Bancos e Instituciones Financieras (SBIF).
- Universidad Adolfo Ibáñez.
- Universidad Alberto Hurtado.
- Universidad de Los Andes.
- Universidad de Valparaíso.
- Universidad Finis Terrae.
- Universidad de Los Lagos.
- Universidad del Bío-Bío.
- Asociación de Fondos Mutuos.
- Asociación de Aseguradores de Chile.



Entrevista en Canal de TV Mega, 2 de octubre



Entrevista en Radio ADN, 2 de octubre



Bolsa de Comercio de Santiago.



Universidad de Valparaíso, Valparaíso.



Universidad del Bío-Bío, Concepción



WORLD INVESTOR WEEK 2017

National Coordinator: China Securities Regulatory Commission (CSRC)

Other IOSCO members: n/a

Other participants: Shanghai Stock Exchange; Shenzhen Stock Exchange; Securities Association of China; China Futures Association; China Securities Investor Protection Fund Corporation Limited; China Securities Investor Services Corporation Limited; 38 regional offices of CSRC and local governments and media

Investor education and protection events and activities were organized by the CSRC and held in cooperation with other self-regulatory organizations (SROs), the contents including:

I. Conduct four thematic programs based on regulatory priorities.

The **first** was the private equity investor education program themed “Say No to Illicit Investment: What is PE and How It Works”; we coordinated with China’s three main telecommunication operators to text investors, distributed education materials of more than 480 thousand sets, and held over 2300 workshops for 5 million participants on site. With over 100 million subscriptions, the program was a big success; the **second** was the bond investor education program themed “Be Rational and Avoid Risks in Bond Investment”. We provided typical cases, Q&As, and risk alerts to increase bond literacy in communities, schools, businesses, and encouraged bond intermediaries to incorporate investor education into the whole business processes and to start an industry initiative to protect the lawful rights and interests of investors; the **third** was the communication program themed “Understanding Rules and Identifying Risks”, covering four topics—“remain far away from insider transactions”, “be alert to market manipulation”, “be preventive for noncomplying information disclosure” and “keep away from illegal operations”. We offered a summary of case studies regarding administrative punishment, helping investors to spot the tricks and foul plays of violators, and understand the boundary rules and bottom lines of risks. More than 230 media published more than 300 articles cover more than 100 million audiences; the **fourth** was facilitating the implementation of “the World Investor Week”. We helped add the Chinese page to the official website of the program, and made available the translated news release of the activities in Chinese; We also engaged with other APRC members to hold activities and hosted investor education events in China. The activities were successful in terms of the number of events, participants and its influence.

II. Build three platforms to serve retail investors.

a) more than one hundred physical and virtual investor education bases are set up to provide free, convenient and professional education services, welcoming more than 100 million visitors online and 5 million persons on site. The information and services are readily available to the general public who just need to walk a few steps to the bases in vicinity or hit a few buttons on line.

b) the operation of the CSRC hotline is further improved. Having handled over 300,000 complaints so far, the hotline plays an important and active role in pacifying investors, resolving disputes and stabilizing both the market and the society.

c) China Investor Website is set up. As a government website, it does not merely display the government's efforts in this regard, but also integrates functions like online education, online mediation, online right exercise and legal support, making it more interactive. This special website provides a platform for investors to communicate and access investor protection services easily.

III. Conduct two pilot projects.

a) the shareholding for voting. A designated investor protection entity purchases 100 shares of each listed company on the A-share market, and exercises rights as an ordinary shareholder. It aims to demonstrate to retail investors how to exercise their rights on one hand, and to urge the listed companies to operate in compliance on the other. The pilot is well received by investors who commend it as a new window for retail investors and two more eyes on the listed companies.

b) incorporating investor education into the national education system. More than 20 provinces, cities and autonomous regions participate in this pilot program, and over 500 schools offer courses to cover almost 2000 classes and millions of students.

2017 WIW webpages for reference:

CSRC: http://www.csrc.gov.cn/pub/csrc_en/

IOSCO: <http://www.worldinvestorweek.org>

Annex:



The second group of 16 national-level investor education centres.



The communication program themed “Understanding Rules and Identifying Risks”.



WORLD INVESTOR WEEK 2017

National Coordinator: Financial Supervisory Commission

Other IOSCO members: Taiwan Stock Exchange Corp.; Taipei Exchange; Taiwan Futures Exchange

Other participants: Securities & Futures Institute; Securities and Futures Investors Protection Center

FSC takes part in IOSCO's 2017 World Investor Week

The FSC participated in the first World Investor Week (WIW) held by International Organization of Securities Commissions (IOSCO). The aim of the event was, through the participation of competent authorities from around the world, to educate investors and increase their self-protection awareness.

The FSC stated that 82 countries and five international organizations took part in WIW and the FSC was also an active participant. Investor education and protection events and activities were planned by the Securities & Futures Institute (SFI) and held in cooperation with other self-regulatory organizations (SROs), the contents including:

1. SROs held 15 different kinds of investor education activities, including financial knowledge and investment lectures, online quizzes with prizes and investor rights and interests conferences.
2. Investor education and protection related information and documents were posted on dedicated webpages, including: TWSE's "Securities and Futures Industries Anti-money Laundering and Countering Terrorism Financing of Securities and Futures Sector," the Securities Investment Trust and Consulting Association's (SITCA) "Taiwan Equity Funds Promotion Area" and the Chinese National Futures Association's "Legal Futures Sector."
3. Educational documents were published, including the Taiwan Depository & Clearing Corporation's "Central Deposit of Securities Account Book Transfer Operations", the Taiwan Securities Association's "Explore the Securities Market" wealth management education e-book, and SITCA's "Key Information for Sales of Mutual Funds --Know KYC and KYP well, and Create Win-win Situations with Customers" handbook.
4. Surveys of investor behavior were carried out, including a questionnaire survey of fund investor behavior and preferences.
5. To raise public awareness of WIW, a lucky draw was held on Facebook.

2017 WIW webpages for reference:

SFI: <http://www.sf.org.tw/wiw/index.asp>

IOSCO: <http://www.worldinvestorweek.org>



“Financial Education and Financial Literacy” Program : Holding seminars on “Investing in the Future” at community colleges



“Financial Education and Financial Literacy” Program : Holding the school and community financial literacy campaign



Taiwan Futures Exchange held classes on futures and options

動態時報相片

WORLD INVESTOR WEEK 2017

IOSCO World Investor Week 2017

活動日期：2017/10/2-2017/10/8

主辦單位：金融監督管理委員會證券期貨局

證券暨期貨市場發展基金會
由游進湧發佈 [?] 已說讚的粉絲專頁 · 9月27日 ·

【按讚+分享+留言/禮券大FUN送/大家相揪來參加】👍👍👍

響德國際證券管理機構組織IOSCO 倡議之「世界投資者週」我國於此期間舉辦多種宣導教育活動，內容多元
活動網址：<http://www.sfi.org.tw/wiw/index.asp>

一、「2017世界投資者週」FB佳文美圖活動👍
10/7 24:00前貼文留言提供推廣「世界投資者週」之
👉 響亮標語或圖案等創意內容
👉 將評選出優勝者10名
👉 贈送超商電子禮券1000元

二、「2017世界投資者週」FB分享活動
【期間】：
即日起~10/7 24:00，凡完成活動步驟的朋友們，將有機會獲得超商電子禮券👍，共有3次中獎機

留言.....

SFI posted "IOSCO World Investor Week 2017" information on its Facebook



WORLD INVESTOR WEEK 2017

Coordinador Nacional: Superintendencia Financiera de Colombia

Otros miembros de IOSCO: Autorregulador del Mercado de Valores

Otros participantes: Bolsa de Valores de Colombia, Bolsa Mercantil de Colombia, Depósito Centralizado de Valores, Universidad Externado de Colombia, Universidad de los Andes, Universidad Santo Tomás, Universidad Autónoma de Bucaramanga, Universidad Autónoma de Occidente, Universidad Piloto de Colombia, Universidad de Antioquia, Universidad ICESI y Universidad CEIPA.

Con ocasión de la Semana Mundial del Inversionista promovida por la Organización Internacional de Comisiones de Valores – IOSCO, realizada del 02 al 08 de octubre de 2017, la Superintendencia Financiera de Colombia y la Unidad de Proyección Normativa y Estudios de Regulación Financiera, URF- del Ministerio de Hacienda y Crédito Público en coordinación con diferentes actores del sistema financiero, como lo son: La Bolsa de Valores de Colombia, la Bolsa Mercantil, el Autorregulador del Mercado de Valores, el Depósito Centralizado de Valores y las Universidades Externado, Andes, Santo Tomás, Rosario, Autónoma de Bucaramanga, Autónoma de Occidente, Piloto, U. de Antioquia, ICESI y CEIPA participaron en la Semana Mundial del inversionista con la realización de aproximadamente 29 actividades, entre charlas, conferencias, conversatorios, paneles de discusión, seminarios, foros y juegos, con el propósito de promover los temas más relevantes en materia de protección y educación al inversionista.

Dentro de las temáticas analizadas durante la Semana Mundial del Inversionista se destaca algunas relacionadas con los derechos de los inversionistas, los riesgos de invertir en el mercado de valores, el funcionamiento de los proveedores de infraestructura, los mecanismos de protección ante la vulneración de los derechos de los inversionistas, las entidades tanto públicas como privadas a donde se puede recurrir ante la vulneración de esos derechos, los deberes de los intermediarios del mercado de valores colombiano, entre otros.

Adicionalmente, durante esta semana se dieron a conocer distintas herramientas pedagógicas, con el fin de facilitar el entendimiento de los temas más relevantes en materia de protección y educación al inversionista. Un ejemplo de esto fue la publicación por parte de la Superintendencia Financiera de la Cartilla “*Cómo protejo mis inversiones en el Mercado de Valores*”, y los videos “*Principios Orientadores para la Protección del Consumidor*”, “*Derechos de los Consumidores Financieros ante Cualquier Intermediario*”, “*Derechos Especiales Frente a Algunos Intermediarios de Valores*” y “*Deberes de los Inversionistas*”. Así mismo, la Bolsa de Valores y la Bolsa Mercantil realizaron el concurso Bolsa Millonaria y Arquitectos del Mercado, con los cuales los participantes interactuaron sobre las actividades propias del funcionamiento del Mercado.

Esta campaña constituyó una oportunidad única para que los distintos actores del sistema financiero colombiano trabajaran coordinadamente con el propósito de fomentar las actividades propuestas para la Semana Mundial del Inversionista.

Registro fotográfico de algunas de las actividades realizadas:







WORLD INVESTOR WEEK 2017

National Coordinator: Dominican Republic Securities Superintendency (SIV)

Other IOSCO members: n/a

Other participants: Dominican Republic Central Bank

The World Investor Week 2017 initiative received an excellent reception from the members of the Dominican financial sector and the general public alike. The Securities Superintendency worked in close collaboration with the Nation's Central Bank, other financial regulators, and the private sector, to organize the week's activities which took place in the cities of Santo Domingo and Santiago.

During the course of the week, SIV celebrated multiple capacity building activities at our Escuela Bursatil (Securities School) training center; high schools in the nation's capital and universities located both in Santo Domingo and Santiago city. This capacity building calendar, was carefully crafted by our Investor Education and Communications divisions to approach key target segments of the population, among them: young adults (ages 16-18) with no knowledge of the Financial sector, university students (ages 20-30) with general knowledge of the Financial sector, legal professionals (ages 30+) with moderate knowledge of the Financial Sector and finally financial professionals with extensive knowledge of the securities market.

As part of WIW, we decided to address our capacity building activities to high school's students from different economic backgrounds, adapting our "Introductory Course to the Dominican Securities Market" for a younger audience generating an early interest in the Financial sector. Additionally, thanks to our collaborators we took this Introductory Course to the city of Santiago de los Caballeros, the nation's second-largest city, and one of the most important business and cultural centers. This allowed us to broaden our financial education scope, and include a larger population group, reinforcing ties with the private sector to promote the general public interest in the Securities Market and financial related matters.

Furthermore, on October 5th, SIV celebrated the 2nd edition of the International Securities Market Summit (ISMS) Santo Domingo 2017, in collaboration with the Iberoamerican Institute of Securities Market (IIMV for its initials in Spanish). The ISM Summit was an initiative started by the Dominican Republic in 2016 to promote knowledge sharing among the Securities Markets regulators of the region and to enhance the harmonization and cooperation between supervisors, regulators, and the private sector. During the Summit, SIV was honored to count with the participation of 17 regulatory authorities from Latin American and European countries, who participated in the academic agenda made up by 3 conferences and 3 discussion panels focus on the importance of Retail Investors Protection and International Best Practices in Supervision.

It is worth noting that during the 2nd edition of the ISMS, we had a massive public participation ranging from 250-300 attendees, and over 500 participants enjoyed the

conference through live streaming services provided by SIV through the wiwrd2017 website, which allowed for remote viewing and participation. All of this was possible thanks to the collaboration and support of over 29 market participants.

In conclusion, given the excellent public reception to the initiative, and the enormous interest for collaboration demonstrated by the securities market participants, it is our understanding that the Dominican Republic will most likely participate in future editions of the WIW. On behalf of the Securities Superintendency of the Dominican Republic, we thank IOSCO for continuously promoting this sort of initiative, and look forward to future collaboration for the advancement of financial education and investor protection worldwide.

Websites:

ISMS - <https://www.youtube.com/watch?v=esRqshASPB4>

ISMS summery - <https://www.youtube.com/watch?v=Qxy01096pQM>

Interviews to the participating authorities-
<https://www.youtube.com/watch?v=XfXRnhbokXc>

Annex:





WORLD INVESTOR WEEK 2017 SEMANA MUNDIAL DEL INVERSIONISTA 2017

National Coordinator: Rafael Balda Santistevan- Intendente Nacional de Mercado de Valores

Other participants: Bolsa de Valores de Guayaquil y Bolsa de Valores de Quito.

Administradoras de Fondos y Fideicomisos- Guayaquil y Quito

Depósitos Centralizados de Compensación y Liquidación de Valores- Público y Privado.

Corporación Financiera Nacional

Emisores del sector no financiero

Universidades

Colegios

Gremios

Medios de Comunicación

Público en general

La Semana Mundial del Inversor 2017 impulsada por la Organización Internacional de Comisiones de Valores (IOSCO) y promovida en el Ecuador por la Superintendencia de Compañías, Valores y Seguros como Miembro Ordinario de dicha organización, en la semana del 2 al 6 de octubre desarrolló varias actividades empresariales y académicas tanto en la ciudad de Guayaquil como en Quito, para concienciar a la ciudadanía sobre la importancia de la educación financiera y la protección al inversionista.

Se contó con la colaboración de los participantes del mercado de valores de las ciudades de Guayaquil y Quito tales como: Bolsas de Valores; Casas de Valores, Administradoras de Fondos y Fideicomisos; Depósitos Centralizados de Compensación y Liquidación de Valores Público y Privado; Emisores entre otros.

Entre las actividades desarrolladas para celebrar la Semana Mundial del Inversionista se llevaron a cabo las siguientes:

Charlas orientadas a estudiantes de colegios de las ciudades de Guayaquil y Quito, alumnos de varias Universidades de las ciudades de Guayaquil y Quito, Portoviejo y Milagro, con quienes se desarrolló el juego bursátil.



Eventos empresariales con las Cámaras de la Producción de Guayaquil y Quito.

En Guayaquil se llevó a cabo la Primera Feria del Inversionista: **“Aprender a Invertir”** así como en Quito se desarrolló la Casa Abierta organizada por la Bolsa de Valores de Quito, ambos eventos para difundir una cultura bursátil en la población.

La Semana Mundial del Inversionista contó con un importante Plan de Medios implementado por la Dirección Nacional de Comunicación de la Superintendencia de Compañías, Valores y Seguros mediante el cual se dio cobertura al evento a través de las redes sociales de la institución (twitter fb) Funcionarios de la SCVS brindaron entrevistas en varios medios de comunicación tales como: prensa radial, escrita y de televisión. Se contó con la publicación de un artículo en uno de los diarios de mayor circulación del país, EXPRESO escrito por Paul Palacios experto consultor en temas financieros y de mercado de valores.

El evento de clausura de la Semana Mundial de Inversionista estuvo organizado por la Bolsa de Valores de Guayaquil en coordinación con la SCVS, al que asistieron representantes de varios participantes del mercado de valores de la ciudad de Guayaquil, empresarios e invitados especiales.

La Superintendencia de Compañías, Valores y Seguros con motivo de desarrollarse la Semana Mundial del Inversionista lanzó un portal de educación financiera denominado SUPEREDUCADOS, con la finalidad de que se constituya en una herramienta de información y consultas para el inversionista, potencial inversionista y del público en general. La dirección electrónica es: [https:// supereducados.gob.ec](https://supereducados.gob.ec)



Debemos indicar que durante las actividades desarrolladas por la Superintendencia de Compañías, Valores y Seguros en la SMI en las ciudades de Quito y Guayaquil se capacitaron aproximadamente a unas 1.002 personas.

WORLD INVESTOR WEEK 2017 IN FRANCE

National Coordinator: Florence Corne

Other participants: INC, La finance pour tous, AFG, the Banque de France, ACPR, F2IC, Better finance and the French national education system

L'Autorité des marchés financiers (AMF), the French financial markets authority, and its partners took part actively in the first "World Investor Week" 2017.

The AMF published a press release about the event, its involvement and activities carried out throughout France, and which generated 152 web, social media and press mentions. This information was seen by a total audience of 15 793 internet users.

The AMF found partners to support the initiative (ACPR, The Banque de France, INC, La finance pour tous, FBF, AFG, F2IC, Better Finance, financial institutions). Partners were also invited to communicate on this week with their internal public (bank, asset-management company, teachers, members...) or general public.

A social network visibility campaign was led by the AMF on Twitter, LinkedIn and Facebook. Posts were made every day throughout the week on the AMF's Facebook page. These posts reached 80 533 people with 1 900 clicks and 487 reactions, comments or shares.



The AMF created specific multi-channel content and organized several meetings during this week:

- The launch of FinQuiz, the AMF's first mobile app for the general public. Available for free on the App Store and Google Play, this quiz tests your knowledge and improve your financial literacy: on how a stock exchange works, main financial concepts, knowledge of investments, etc. Nearly a thousand questions to discover and acquire best practices and improve your financial general knowledge. Thanks

to the visibility offered by World Investor Week, its launch was a success and one month later the application has been downloaded by more than 5700 people.



Do you want to test your financial culture? Download the application.

- The AMF created a radio campaign in partnership with INC proposing 1.5 min educational broadcasts on many topics: preparing for retirement, employee savings and investment scams. The campaign was broadcasted by more than 110 national and local radios from 2 to 28 October and is available as a podcast on the following channel: <https://soundcloud.com/info-placement>. This campaign's is estimated at 2 148 944 people.



- The AMF held meetings with the public:
 - A meeting on the supervision of financial markets in partnership with F2IC (French Federation of Investment Individuals and Clubs) at the Banque de France in Lyon on 2 October. More than 80 people attended this event;
 - A web conference on 5 October on IPOs with 120 people.



- In addition to the substantial content for investors already available on its website, the AMF created new content on investments:
 - An infographic to better understand the main risks of investments;
 - A video tutorial on investment diversification. This video has been seen 21 279 times.



WORLD INVESTOR WEEK 2017

World Investor Week (WIW) is a week-long, global campaign promoted by IOSCO to raise awareness about the importance of investor education and protection and to highlight the various initiatives of securities regulators. The week was used to promote the said objectives which began with a launch on 3rd October, 2017 and ended on 6th October, 2017. The Securities and Exchange Commission together with other stakeholders in Ghana participated in the week-long celebration.

As part of the celebration, the Securities and Exchange Commission organised a seminar for investors/shareholders, the general public and institutions within the capital market. The theme for the seminar was “The Right of the Retail Investor”.

The activities for the celebration took various forms such as radio and television appearances by staff of the Commission to educate the general public on the rights of the retail investor.

The theme for the week-long activities was deemed appropriate in the light of the recent unfortunate development regarding two of the local banks one of which was listed on the Ghana Stock Exchange.

Delivering his welcome address during the seminar, the Director-General of the Securities and Exchange Commission, Rev. Daniel Ogbarmey Tetteh said that the Commission which is the apex regulator of the securities industry in Ghana subscribes to IOSCO’s core principles of securities regulation of protecting investors, ensuring fair, efficient, transparent market, and the reduction of systemic risk.

Rev Ogbarmey Tetteh stated that the Commission is committed to ensuring that investors/shareholders/shareowners know their rights through public education and awareness. He went on to say that the Securities Industry Act 2016, (Act 929) empowers the Commission to ensure that investors are protected from misleading, manipulative or fraudulent practices of listed companies and market operators.

According to Rev. Ogbarmey Tetteh, through good corporate governance practices and shareholder activism, viable entities would be maintained and shareholders interest safeguarded. He encouraged the public and retail investors to take keen interest in whatever goes on in the capital market and not to hesitate to check with the Commission, the licensing status of anyone or firm who offers what looks like a capital market product or report any suspicious activities.

Finally, the Director-General made it known to the participants by stating that the Commission is “committed to strengthening the structures that will vault the capital market in Ghana some notches higher to help facilitate the transformation agenda of the economy of Ghana”.

One of the main speakers at the Seminar, lawyer George B. Asare-Afriyie, who lectures at the GIMPA Law School, gave a detailed presentation on the rights accrued to a retail investor from the perspective of the legal regimes pertaining to the capital market. He cited various provisions and sections of the Companies Act 1963 (Act 179) and the Securities Industry Act 2016 (Act 929). His presentation touched on the role to be played by the Commission in ensuring investors rights and went further to provide specific provisions in Act 179 and Act 929 respectively which can serve as tools for the shareholders/investors/shareowners in ensuring their rights. His presentation enlightened the retail investors regarding actions they can take if they are not treated as mandated by law.

On his part, the Deputy Director-General of the Commission gave out vivid information patenting the way shareholders interact with the various market operators whom they have shares with. He said it is the responsibility of shareholders to check or serve as watchdogs on the market to ensure transparency and efficiency in the affairs of market operators. That is to say, the shareholders need to be proactive and engage the Board of Directors to know the intentions and status of the company from time to time.

The representative of Ghana Stock Exchange (GSE), Mrs. Mate-Kole, who happens to be the general manager talked on the rights of the investor from the perspective of the Ghana Stock Exchange. She indicated that the GSE has a huge responsibility in ensuring that the rights of investors in securities listed on the exchange are protected to ensure that market integrity and confidence are maintained. She said that the exchange has a set of rules that govern the listed companies. The GSE also ensures that all listing requirements are met by firms before they are listed on the market.

Mrs. Melvina Amofo from the Central Securities Depository (CSD) spoke on the topic from the perspective of the CSD. She said their institution is a specialized financial institution that holds securities like shares and bonds in un-certificated form (electronic form). According to her, the CSD records the ownership of all securities owned by investors in the country. She emphasised that investors buy shares for several reasons, hence as part of the rights of the retail investor, an account is opened for them at the CSD to enable the investors deposit their securities. She added that investors have the right to use their securities in the account as collateral and for other economic activities by transfer of shares from one account to the other.

Investors, shareholders and the general public who were in attendance asked various questions on investor rights. Shareholders/investors and the general public were grateful for such a seminar and asked that more of such seminars be organised across the country to educate investors.

Report filed by Frank B Donkor, Securities and Exchange Commission, Ghana.



WORLD INVESTOR WEEK 2017 GERMANY

National Coordinator: Federal Financial Supervisory Authority (BaFin)

For BaFin and, in particular, its Department for Consumer Protection, established as recently as 2016, and its Group Communications, taking part in World Investor Week 2017 was a great opportunity to draw even more public attention towards its activities for financial consumers.

The incredible effort put in by all the staff involved made the following activities possible:

As the anchor event of BaFin's World Investor Week, the Securities Experts' Day on BaFin's Consumer Helpline on 5 October invited consumers to ask leading experts from BaFin questions on securities investments. By dialing a toll-free-number they could talk to BaFin's Chief Executive Director of Securities Supervision/Asset Management, Elisabeth Roegele, and Head of the Department for Consumer Protection, Christian Bock, among others. Consumers sought general advice on investments as well as airing their specific problems with banks, insurance undertakings and financial services providers.

Furthermore, for the first time in BaFin's history, a video was produced which addressed consumer affairs. With the help of a professional filming agency, BaFin employees answered questions such as:

"Which investment is most appropriate for my personal situation?"

"How should I prepare for a meeting with an investment adviser?"

"Why is investment advice a sensitive matter?"

As this means of communication has become increasingly popular in recent years, BaFin now intends to make steady use of it to reach even more consumers. Thus, World Investor Week has become the kick-off event for further video messages from BaFin.

In addition, a brochure with useful advice on investing during retirement was published on BaFin's website. This 45-page booklet, appropriately designed for the target group, is now available as a PDF document and in printed form. Thus, BaFin approached a group of consumers of increasing significance given not only the growing number of people above the age of 65 but also the increasing amounts of money ready for investment by these persons and their specific needs such as the option of flexible and short-term disinvestment in the event of illness and the individual needing care. This brochure is now available both as a PDF document on BaFin's website and in printed form.

Last but not least, a mini-encyclopedia in simple German explaining important terms from A-Z completed BaFin's activities for World Investor Week. Seventy-seven terms relating to investments are explained in simplified German, making the contents easier to understand for people with learning and/or reading problems as well as people not fluent in German. However, everyone can benefit from the simple language used. Special attention is paid to wording, sentence construction, spelling and format, thereby facilitating understanding and supporting the individual's self-determination. This mini-encyclopedia is now available both as a PDF document on BaFin's website and in printed form.

WORLD INVESTOR WEEK 2017

National Coordinator: Heidi A Bocarisa

Other IOSCO members: Gibraltar Financial Services Commission

Our participation in the WIW campaign consisted of a number of linked strands of work.

These included the publication of 6 articles in a local paper - one each day from 2nd to 7th October - which focused on a different aspect of investor protection (see photos attached). Links to these consumer-focused articles were also provided on social media via our Facebook and Twitter accounts. A different 'tip of the day' was also posted and tweeted each day.

During the course of the week 'pop-in' sessions were hosted in a number of locations and regulatory staff were available to answer queries and questions from consumers on financial matters. A number of leaflets were also produced – these provided information on areas and products that had been largely covered in the newspaper articles and helped to further reinforce the messaging. The general public was complimentary of the initiative and very much welcomed the opportunity for learning that was provided – a number asked whether WIW would become an annual event.

The timing of WIW was also used to officially kick-off our own consumer education programme – "Moneywise". This is a long-term programme that will initially target school children via interactive face-to-face sessions and school material that has been produced. A dedicated website is being developed which will be easily accessible and navigable and on which further material and activities will be available. The programme will eventually also target other segments of society e.g. pensioners and persons in vulnerable positions.

The work of the GFSC in relation to both WIW and Moneywise was featured in the local news on both television and radio, via interviews with the national coordinator, as well as coverage in the local press.



4 CREDIT CARD CHINKS UP

World Investor Week (WIIW), today to 8 October
The International Organization of Securities Commissions (IOSCO) is running an initiative called World Investor Week (WIIW) from today until 8 October. The focus is on investor education and protection, and IOSCO members are carrying out a wide variety of activities and marketing and outreach measures to engage their members. Throughout this week the Gibraltar Financial Services Commission (GFSC) will also host a pop-up information centre for the public on Wednesday, Thursday and Friday, 10am-5pm at Atlantic School.

Getting wise about money

By Mark Baines, Chief of Gibraltar Financial Services Commission
H ere we are, almost a month into the 2017 World Investor Week (WIIW) which ends tomorrow. The theme of WIIW has been investor education and protection, and IOSCO members are carrying out a wide variety of activities and marketing and outreach measures to engage their members. Throughout this week the Gibraltar Financial Services Commission is supporting WIIW.

Having a good understanding of financial matters can have a material impact not only on an individual's life choices but also on communities in general.
Investment and entrepreneurship are two of the most important ways in which individuals can improve their financial position and create wealth for themselves and their families. However, these activities are often misunderstood and many people are reluctant to engage in them. This is often due to a lack of understanding of the risks and rewards involved, and a fear of loss. It is important to have a good understanding of these matters, and to seek professional advice if needed. The GFSC is providing a pop-up information centre to help people understand these matters better.

The GFSC is also supporting WIIW through a series of events and activities. These include a pop-up information centre, a series of seminars and workshops, and a range of marketing and outreach measures. The GFSC is committed to providing high-quality investor education and protection services to all Gibraltar residents.

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Growing and protecting your 'pension pot'

By Mark Baines, Chief of Gibraltar Financial Services Commission
L ife is a long journey, and it is important to plan for the future. One of the most important ways to do this is through a pension plan. A pension plan is a long-term investment vehicle that allows you to save for retirement. It offers a range of investment options, and the potential for long-term growth. It is important to choose a pension plan that suits your needs and goals. The GFSC is providing a pop-up information centre to help people understand these matters better.

Most people are familiar with the advantages of a defined benefit or final salary pension scheme which essentially guarantees an income in retirement. However, many of these are now being replaced with pension schemes that offer less for employers to operate and manage but which don't guarantee a defined amount in retirement for the employee.

Credit card payments, how will you pay next?

By William Gibson, Advisor Gibraltar Financial Services Commission
A money card can be a convenient way to manage your money. It allows you to make payments and withdrawals using a card that is linked to your bank account. It offers a range of features, including contactless payments, and the ability to manage your money online. It is important to choose a money card that suits your needs and goals. The GFSC is providing a pop-up information centre to help people understand these matters better.

Most people are familiar with the advantages of a defined benefit or final salary pension scheme which essentially guarantees an income in retirement. However, many of these are now being replaced with pension schemes that offer less for employers to operate and manage but which don't guarantee a defined amount in retirement for the employee.

Debit cards
Debit cards allow you to make payments and withdrawals using a card that is linked to your bank account. They offer a range of features, including contactless payments, and the ability to manage your money online. It is important to choose a debit card that suits your needs and goals. The GFSC is providing a pop-up information centre to help people understand these matters better.

With contactless payments, customers simply tap their contactless device, which can be a credit card, mobile phone, smartwatch or fitness tracker against the contactless payment terminal and they're ready to go!

Prepaid cards
Prepaid cards are a convenient way to manage your money. They allow you to make payments and withdrawals using a card that is linked to your bank account. They offer a range of features, including contactless payments, and the ability to manage your money online. It is important to choose a prepaid card that suits your needs and goals. The GFSC is providing a pop-up information centre to help people understand these matters better.

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Phishing: What is it and how does it work?

By Alan Davis, Chief of Gibraltar Financial Services Commission
Phishing is a type of cyber attack where attackers use email or phone to trick people into giving sensitive information. They often use social engineering techniques to make their requests seem legitimate. It is important to be aware of these risks and to take steps to protect your information. The GFSC is providing a pop-up information centre to help people understand these matters better.

Techniques used by phishers can include sending a wave of spam emails to randomly selected addresses or phone numbers. Each email has a message that is cleverly masked to appear as if it has come from a well-known and trusted source.

Think about investment

By Louise Gillen, Manager Gibraltar Financial Services Commission
A pop-up information centre is being held at Atlantic School to help people understand investment opportunities. The centre will provide information on a range of investment options, and the potential for long-term growth. It is important to choose an investment option that suits your needs and goals. The GFSC is providing a pop-up information centre to help people understand these matters better.

Whenever you make an investment, always make sure you are aware of the costs involved, which could range from commissions to management fees. The common definition of an investment can relate to any mechanism used with the purpose to generate a future income.

Investment is a long-term commitment to put your money into an asset that is expected to grow in value over time. It offers a range of opportunities, including stocks, bonds, and real estate. It is important to understand the risks and rewards of each option, and to seek professional advice if needed. The GFSC is providing a pop-up information centre to help people understand these matters better.

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Spot the difference: Loans and mortgages

By Dominic Savage, Senior Regulatory Officer Gibraltar Financial Services Commission
Loans and mortgages are both ways to borrow money. However, they differ in a number of key ways. Loans are typically used for a range of purposes, while mortgages are specifically used to buy property. It is important to understand the terms and conditions of each option, and to seek professional advice if needed. The GFSC is providing a pop-up information centre to help people understand these matters better.

A loan is traditionally known as 'money borrowed from a bank'. While this is still the case, there are also other companies who will offer loans to individuals that are not banks. Individuals can take out loans in order to pay for a range of things and repay the loan amount over an agreed period of time (e.g. 5 years).

Loans are a way to borrow money from a lender. They offer a range of options, including personal loans, car loans, and business loans. It is important to understand the terms and conditions of each option, and to seek professional advice if needed. The GFSC is providing a pop-up information centre to help people understand these matters better.

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With contactless payments, customers simply tap their contactless device, which can be a credit card, mobile phone, smartwatch or fitness tracker against the contactless payment terminal and they're ready to go!

Prepaid cards
Prepaid cards are a convenient way to manage your money. They allow you to make payments and withdrawals using a card that is linked to your bank account. They offer a range of features, including contactless payments, and the ability to manage your money online. It is important to choose a prepaid card that suits your needs and goals. The GFSC is providing a pop-up information centre to help people understand these matters better.

Contactless
Contactless payments allow customers to make payments without the need for a card or cash. They offer a range of features, including contactless payments, and the ability to manage your money online. It is important to choose a contactless payment method that suits your needs and goals. The GFSC is providing a pop-up information centre to help people understand these matters better.

Credit cards
Credit cards allow you to make payments and withdrawals using a card that is linked to your bank account. They offer a range of features, including contactless payments, and the ability to manage your money online. It is important to choose a credit card that suits your needs and goals. The GFSC is providing a pop-up information centre to help people understand these matters better.

Contactless
Contactless payments allow customers to make payments without the need for a card or cash. They offer a range of features, including contactless payments, and the ability to manage your money online. It is important to choose a contactless payment method that suits your needs and goals. The GFSC is providing a pop-up information centre to help people understand these matters better.

WORLD INVESTOR WEEK 2017

National Coordinator: Guernsey Financial Services Commission

Other IOSCO members:

Other participants:

The Guernsey Financial Services Commission supported the World Investor Week campaign by hosting a breakfast where invited stakeholders and partners learnt more about a number of initiatives that the Commission has recently instigated, specifically in respect of retail investors.

Discussion topics included Lending, Credit & Finance, Thematics and Pensions, and a help sheet for the latter topic was produced and is now available on the Commissions website.

The Commission received positive feedback after the event from those who were in attendance.

WORLD INVESTOR WEEK 2017 – HONG KONG REPORT

National Coordinator:

Investor Education Centre (IEC), subsidiary of the Securities and Futures Commission.

Other participants:

The Hong Kong Society of Financial Analysts (HKSFA); and
The Institute of Financial Planners of Hong Kong (IFPHK).

The IEC fully supported WIW 2017, and we invited the HKSFA and the IFPHK to work together to launch the following initiatives to promote investor education and protection during WIW:

Activities	Organiser
1. Launched a new Investor Portal under the Chin Family website	The Chin Family
2. Ran an online campaign with the theme “Be A Smart Investor” to the promote WIW and the Investor Portal	
3. Communicated the education messages via the Chin Family Facebook Fan Page	
4. Published the findings of IEC's Retail Investor Survey	IEC
5. Radio program to talk about business valuation, the CFA Control Room	HKSFA
6. Facebook Live Financial Clinic to address financial planning questions raised by the public	IFPHK

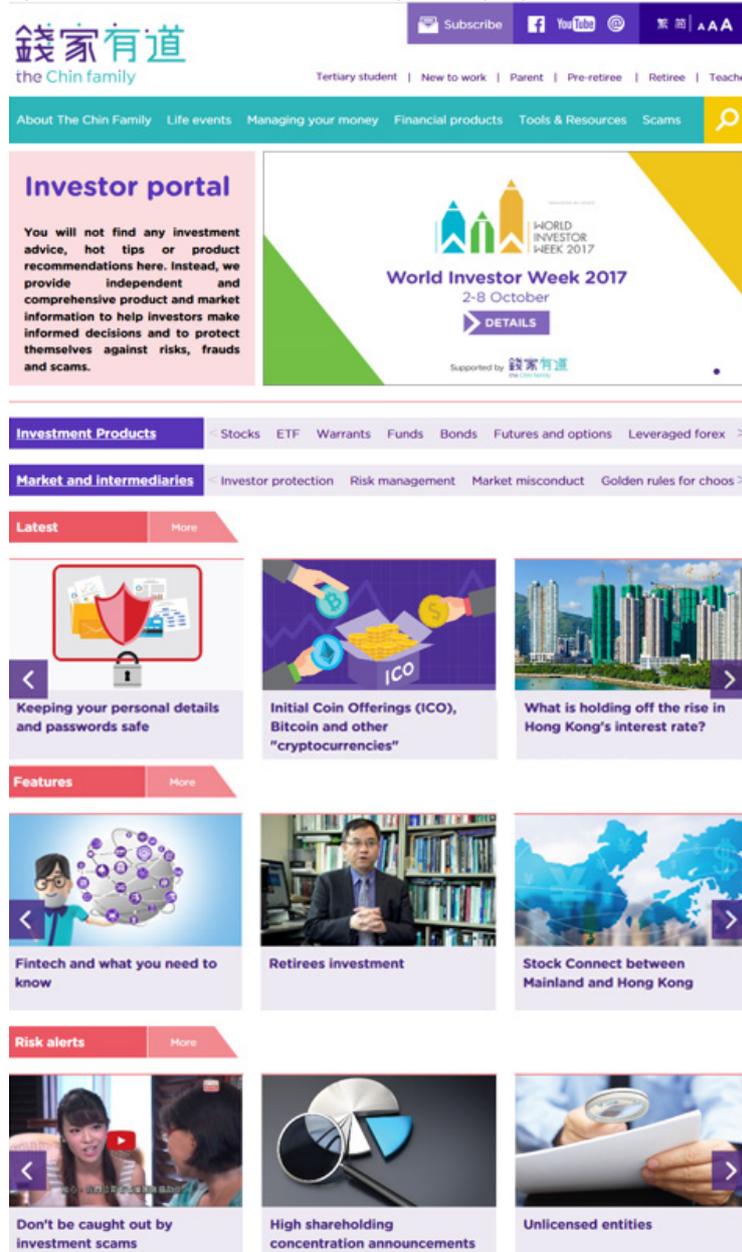
Evaluation of the IEC/Chin Family initiatives

Investor Portal	Page views	12,565
	Sessions	8,923
	Users	8,872
Online poll	Votes	2,327
Facebook	Feeds	4
	Likes	2,584
	Fans	48,776
Email	Click through rate	30.71%
	Open rate	27.15%
Press	Press release	1
	News coverage	54

Remarks: Oct 2 and Oct 5 were public holidays in Hong Kong and, with many people away from work and on holiday, this had a negative impact on our WIW initiatives.

Highlights

A new Investor Portal - The Chin Family launched a new Investor Portal featuring comprehensive and independent information to help consumers make well-informed decisions and become smart investors. The Investor Portal is a one-stop resource for both novice and experienced investors to learn more about the breadth of financial products, and the principles of trading and investing. Other information include smart tips, scam alerts, as well as regulatory updates for smart investor protection.



The screenshot shows the homepage of the Investor Portal, '錢家有道 the Chin family'. The site features a navigation menu with categories like 'About The Chin Family', 'Life events', 'Managing your money', 'Financial products', 'Tools & Resources', and 'Scams'. A prominent banner for 'World Investor Week 2017' (2-8 October) is displayed, supported by the portal. Below the banner, there are sections for 'Investment Products' (Stocks, ETF, Warrants, Funds, Bonds, Futures and options, Leveraged forex) and 'Market and Intermediaries' (Investor protection, Risk management, Market misconduct, Golden rules for choos). The main content area is divided into three sections: 'Latest', 'Features', and 'Risk alerts'. Each section contains several article cards with images and titles, such as 'Keeping your personal details and passwords safe', 'Initial Coin Offerings (ICO), Bitcoin and other "cryptocurrencies"', 'What is holding off the rise in Hong Kong's interest rate?', 'Fintech and what you need to know', 'Retirees investment', 'Stock Connect between Mainland and Hong Kong', 'Don't be caught out by investment scams', 'High shareholding concentration announcements', and 'Unlicensed entities'.

Communication via the Chin Family Facebook, e.g. short quiz, polling, survey findings etc, to raise awareness and generate interest of WIW and to take action

錢家有道 The Chin Family
10月6日 13:00 · 已讀

【錢家熱話：一分鐘測試你是否醒目投資者】
你敢唔敢自稱係醒目投資者？錢生我整咗個小測試，足足有9樣投資注意事項！即刻click <https://goo.gl/4qo15p> 用短短一分鐘就知自己有幾smart！投資唔係買樓咁簡單，當中涉及好多變動同風險，做足準備先至醒！

先求知，再投資。即上錢家有道「投資頻道」(<https://goo.gl/Qmjiv5>) 睇下啦！... 展开



錢家有道 The Chin Family
10月3日 18:00 · 已讀

【錢家熱話：您心目中預期嘅投資回報？】
投資當然希望有回報啦，以下邊一項係最適合形容你心目中預期嘅投資回報呢？
Like = 每年30%或以上
Love = 每年20%至少於30%
Haha = 每年10%至少於20%... 展开



錢家有道 The Chin Family
10月2日 18:00 · 已讀

【錢家熱話：2017世界投資者週】
投資係一把雙面刃，可為資產增值助你實現財務目標，但亦要承受風險，行動前當然要學多啲了解多啲！10月2日至8日舉行嘅「2017世界投資者週」(<https://goo.gl/PxgyaL>)，目的就係推動投資者教育及保障！錢生我都大力支持，大家趁機會充實一下自己的投資知識，快啲上錢家有道最新推出嘅「投資頻道」<https://goo.gl/Qmjiv5> 學習精明投資之道啦。記得share埋畀你嘅朋友呀！

先求知，再投資。即上錢家有道「投資頻道」(<https://goo.gl/Qmjiv5>) 睇下啦！... 展开



錢家有道 The Chin Family
9月29日 17:00 · 已讀

【錢家熱話：錢家有道「投資頻道」面世喇！】
調查發現，六成受訪者曾於過去一年進行至少一項投資，當中約三成曾投資不適合嘅產品，例如鎖定期太長、風險太大等。所以投資前一定要做功課，了解投資產品特性及風險。即刻上錢家有道 - 「投資頻道」睇下啦 (<https://goo.gl/Qmjiv5>)！呢個係一站式嘅資訊平台，為投資人士提供各種知識，好似投資產品、投資概念、證券買賣、精明貼士，投資警報等！記得share埋畀你嘅朋友，一齊學習精明投資之道！

One-third of the Hong Kong investors claimed that they had invested in unsuitable products in recent survey. Don't want to repeat the same mistake? Let's get prepared before investing by checking out The Chin Family Investor portal (<https://goo.gl/GaoGY...>) 展开



錢家有道「投資頻道」面世喇！

登入投資頻道

錢家有道「投資頻道」
投資頻道——一站式投資教育資訊平台：這裡沒有股票標把、貼士、投資意見、產品推介。但我們提供中立、全面、詳細的投資產品及金融市場資訊，協助投資者作出明智的投資決定。

THECHINFAMILY.HK 详细了解

Widespread media coverage on IEC's survey regarding Hong Kong investors' attitudes and behaviours



投資者教育中心：香港人投資部署應審慎少少

09月27日(三) 14:49

投資者教育中心中心總經理李博衛

今年港股表現不俗，但指升逾25%，但係投資者教育中心總經理李博衛提醒，唔好畀1年好市呢咗，投資回報拉勻幾年纔會有咁高，大家唔好太大期望。雖然香港人嘅金融知識水平比起好多國家高，但講到投資部署，但話香港人應該審慎少少。

投資者教育中心8月做嘅《零售投資調查》顯示，近6成成年人唔過去12個月有投資，當中的3成曾經投資唔適合嘅產品。

而香港人最常炒嘅係股票(48%)、外匯(27%)同基金(14%)，但提醒投資前記住做足功課，唔好衝動，盲目入市，好易輸到好甘。



投資者教育中心：少於一成受訪者投資前研究投資文件

2017-09-27 HKT 16:50

投資者教育中心一項調查發現，90%受訪者表示投資前有做功課了解產品，但四分之三是倚賴朋友及家人意見，35%表示會諮詢專業人士例如證券經紀或銀行客戶經理等，少於10%投資者表示會研究招股書或投資文件。

投資者教育中心今年8月進行的零售投資者調查顯示，60%受訪者過去12個月曾進行最少一項投資，近一半投資股票，但有大約三分之一投資者承認曾作出不適合的投資，原因包括產品對本身現金流有不利影響、投資風險太大，以及產品與起初了解有出入，65%投資者承認該項投資帶來虧損。

調查又發現，平均而言受訪投資者期望地賺取17%投資回報，近半受訪者更期望得到10%至20%的年度回報率。



投資者教育中心：研推產品比較平台

2017年10月11日 星期三 4:40PM

監管會旗下的投資者教育中心研究明年推出網上理財產品比較平台。總經理李博衛表示，暫時未有決定比較的產品類別，但強調不會像坊間具商業成分的價格平台，會以獨立公正的方式運作，並指需要時間考慮平台上的資訊，是否對投資者有用。

另外，中心上月就香港投資者行為進行調查，訪問500人中，發現只有不足一成人在投資前會閱讀相關財務文件，而大部分只依賴朋友及家人意見投資。李博衛表示，在澳洲及紐西蘭等地的市場，投資前諮詢專業意見的比例較多，香港業界需考慮如何加強市場信心，同時投資者做決定時應充分了解多方意見。

假若今年累計升幅達26%，李博衛促投資者需採取長線投資策略，亦需留意利率上升對信貸產品的影響，尤其按揭貸款息，當利率升至2-4%時，負擔將明顯加重，而父母幫子女付首期在港亦較外地常見，他認為主要是因為樓價高企，但稱買家人士亦需留意供樓風險。

記者：余慕恩

Facebook live program to address financial planning questions raised by the public



IFPHK 香港財務策劃師學會 直播了 ...

已贊主页 · 10月4日 ·

【Live IFPHK Financial Clinic x 世界財務策劃日】

今日適逢是中秋節及首個「世界財務策劃日」，IFPHK今日特別邀請了行政總裁劉振輝Dennis及前主席謝汝康Chris，於上午11時透過Facebook解答市民常遇的財務策劃問題。 — 在 IFPHK 香港財務策劃師學會

1,152 次播放



WORLD INVESTOR WEEK 2017

National Coordinator: Central Bank of Hungary (MNB)

Other IOSCO members: -

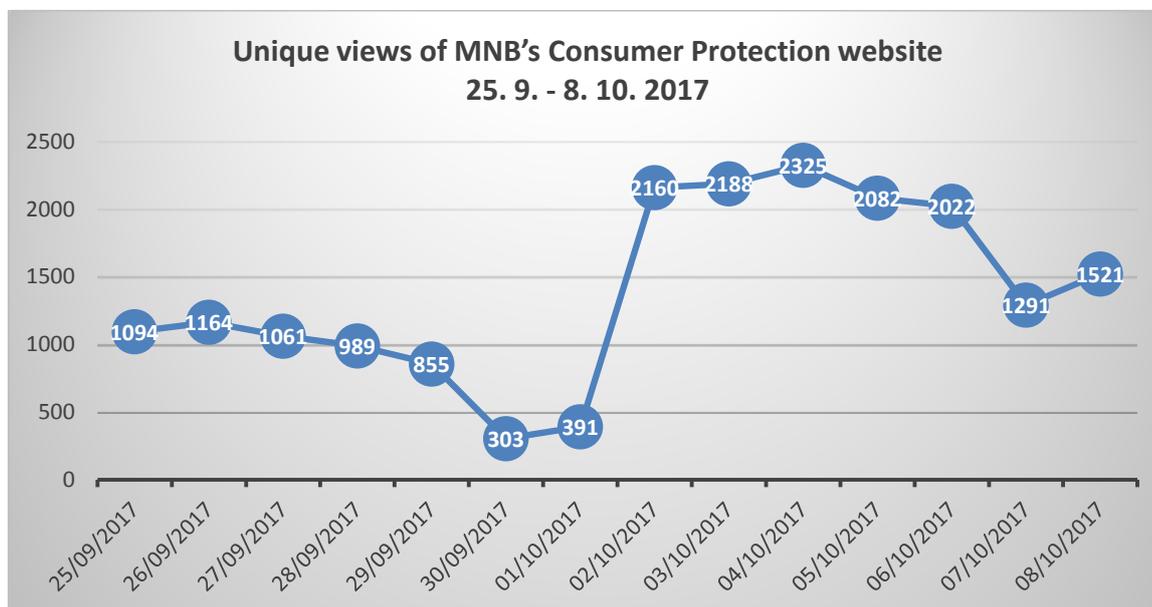
Other participants: -

The Central Bank of Hungary (MNB) participated actively in World Investor Week 2017, promoting information and resources for investors via its Consumer Protection website and a short communication campaign.

The main message of the campaign was about the importance of seeking information before choosing an investment and about the risks of the different investment categories. The design of the campaign was created by an agency, with the headline: "Keep your investments secure! Always gather information before making a decision!"

Ca. 500 posters of the campaign got installed and educational shortfilms were broadcasted at selected post offices.

The online media campaign from 2 to 8 October, MNB's WIW-advertisements and contents had 4,5 million advievs. The dedicated landing page on the MNB's website had 6.748 unique views during the campaign, so at this period that was the most visited page on MNB's Consumer Protection website.



As part of the WIW-activities special lectures were organized with presentations by MNB directors for university students at 5 cooperating universities and local presentations for more than 200 clients in 13 counties by the countrywide Financial Protection Consultant Office Network on the topic of investments.

PÉNZÜGYI NAVIGÁTOR PÉNZÜGYI FOGYASZTÓVÉDELMI KÖZPONT

TARTSA BIZTOS KÉZBEN BEFEKTETÉSEIT!
Döntés előtt mindig tájékozódjon!

Befektetésekkel kapcsolatban is útmutatást nyújt a PÉNZÜGYI NAVIGÁTOR.

Pénzügyekben Önnel – Önért! www.mnb.hu/penzugynavigator

MNB » Fogyasztóvédelem » Hírek, aktualitások » Megfontolt döntés, kevesebb kockázat

Hírek, aktualitások

- Pénzügyekben Önnel - Önért!
- Megfontolt döntés, kevesebb kockázat
- Queator információk
- Pénzügyi szolgáltatások versenye
- Nem jelzálog alapú hitelek forróttsága
- Astra Biztosít
- Buda Cash, DIB Bankcsoport információk ügyfeleknek
- Ünelli zálogjog GyIK
- Állományruházás pénzügyi intézmények között



Megfontolt döntés, kevesebb kockázat

A megtakarítási és befektetési termékek palattáján az egyszerűbből az összetetteg számos konstrukció megtalálható, ennek megfelelően az egyes típusok előző hozamot ígérnek. A befektetések általában nagyobb hozammal kecsegtetnek, de fontos szem előtt tartani, hogy kockázatosabbak is, jelentős veszteséget is eredményezhetnek! Mivel sok esetben komplex terméktípusról van szó, azok számára ajánlott, akik mélyebb pénzügyi ismeretekkel rendelkeznek.

Ha megtakarítását befektetéssel kívánja gyarapítani, készítsen befektetési tervet! Ehhez egyebek mellett gondolja át, hogy mekkora összeget tud erre a célra fordítani és azt milyen hosszú időre tudja nélkülözni! Mérélegelje, mennyire fontos, hogy az összeg a lekötés időtartama alatt is bármikor hozzáférhető legyen! A kockázatok csökkenthetők, ha megtakarítását nem egyetlen szolgáltató egyetlen termékébe fekteti. Csak a megadható tőke lehetőségei között a diversifikáció, megtakarítás megosztása nemcsak az egyes befektetési és megtakarítási típusok jellemzői találhatók meg könnyen áttekinthető, egymással összehasonlítható formában, de számos, a befektetési terv készítéséhez hasznos tanács is elérhető. Utóbbihoz további tippeket talál a [Működő befektető](#) c. Pénzügyi Navigátor füzetben.

Ha megtalálta a legmegfelelőbbnek tűnő konstrukciót, alaposan nézze utána a részleteknek és feltételeknek, valamint annak, hogy a szolgáltató rendelkezik-e a szükséges engedéllyel! Az ellenőrzést egyszerűen elvégezheti a [Piaci szereplők keresésével](#). Ez azért is fontos, mert Ott csak akkor illeti meg befektetési védelem, ha engedéllyel rendelkező szolgáltatóval szerződik.



Kapcsolódó tartalmak

- Befektetés, megtakarítás
- Pénzügyi Navigátor Alkalmazások
- Sajtóközlemény
- Hírcsatorna



Kapcsolódó fájlok

- 7. Működő befektető
- Extra - Egy percben az értékpapírszámítás online lekérdéséről





ORIGO ITTHON NAGYVILÁG GAZDASÁG SPORT TÉVÉ FILMKLUB TUDOMÁNY MÉG TÖBB

Az önzetű autók örökre megváltoztatják a közlekedést

BALOGH TAMÁS MÁRK | 2017.10.02. 09:29

A UBS tanulmánya szerint az önzetű autók megjelenése örökre megváltoztatja majd a tömegközlekedést. A "robotaxik" a következő néhány évben jelennek majd meg és felforgatják a hagyományos közlekedési szektort. A változás elképzelhetetlen és már az ajtón kopogtat.

ERRŐL TUDNIA KELL



Csúcsot döntött a villamosenergia-fogyasztás nyáron
Sikeresen vizsgázott az első önműködő termőföld
A legbrutálisabb afrikai népiirtás országa lehet a jövő turistaparadicsoma

A **UBS tanulmányából** kiderül, hogy az önzetű autók legnagyobb hatással a taxisokra lehetnek majd. Ugyan több országban is sikerült kivédeniük az Uber és más közösségi fuvarszolgáltatások támadásait, az önzetű taxik ellen viszont ők sem tehetnek majd semmit. Piacvezető lehet majd többek között az Uber is, amely már teszteli a flottáját és néhány évvel ezelő sőtől nélküli taxikkal szeretné elárasztani a világ nagyvárosait.

- ### FRISS HÍREK
- 21:39 **A sofőr kiszáradását érzékelő** (léleghuzatot fejlesztettek ki, hogy kevesebb legyen a baleset)
 - 21:21 **Meglepő vallomás: Hasselhoff** abbaghja a színészkedést?
 - 21:18 **Módosított fegyvert** használhatott a Las Vegas-i merénylet
 - 21:15 **A Barcelona is csatlakozik** a sztrájkhoz - senki sem focizik a csapatból
 - 21:04 **Ext látnia kell:** tündéri didergő medvebocskokat mentettek a halászcik - videó
 - 21:00 **Arcfelismerésen alapuló** azonosítást tesztel a Facebook

Villamossal ütközött egy személyautó hétfő kora este Budapest V. kerületében, a Balassi Bálint utca és a Balaton utca kereszteződésében. A balesethez a főváros hivatásos tűzoltói érkeztek ki, akik megkezdték a műszaki mentési munkálatokat. Elsődleges információk szerint az eset során senki nem sérült meg - adta hírül a katasztrófavédelem.

Portfólio

Elfelelően fedekesse be pénztét! (x)

2017. október 4. 08:27

Befektetésekkel kapcsolatban is segítséget nyújt a Pénzügyi Navigátor.

A pénzügyekkel kapcsolatos döntéseink nemcsak a mindennapokban fontosak, hanem befektetéseink során is megfontolt döntéseket kell hoznunk. Ahhoz, hogy elődjünk, mihez is kezdjünk befektetni kívánunk pénzünkkel, el kell határoznunk, hogy a jellemzően kiszámíthatóbb, alacsony kockázati tényezőkkal rendelkező, másképp, de biztos hozammal bíró megtakarítást (pl. bankbetét, megtakarítási számla) vagy a sok esetben komplexebb, melyebb pénzügyi ismereteket, tapasztalatot igénylő, kockázatosabb, külső tényezők által jelentősen befolyásolt befektetést (pl. részvény, befektetési jegy) választjuk. Ne feledd: a megfontolt döntés kevesebb kockázatos jelenthet!

Ha megtakarítását befektetéssel kívánja gyarapítani, készítsen befektetési tervet! Ismerje meg kellő alaposan a befektetési termékeket: válasszon az engedélytel rendelkező befektetési vállalkozások megfelelő ajánlatát közül és ne feledd: meg kell felelnie az ezekhez kapcsolódó díjakról, költségekről sem!





WORLD INVESTOR WEEK 2017

National Coordinator: India - SEBI

Other IOSCO members:

Other participants:

Report On Activities Undertaken During World Investor Week

1. During the World Investor Week ('WIW'), conducted from October 02-08, 2017, SEBI had co-ordinated in conducting programs related to investor education and financial education across various cities in India. Apart from SEBI, Recognized Stock Exchanges, Depositories, Investor Associations and SEBI empanelled Resource Persons had also conducted various investor awareness activities.
2. SEBI, in association with Stock Exchanges and Depositories, conducted regional investor awareness seminars across the country, mainly, focusing on Tier II and Tier III cities/ towns to promote investor education. Separately, Stock Exchanges and Depositories also conducted Investor Awareness programs across various cities in India. In these programs, investors were provided useful information on securities market and covered basic concepts like investing in securities market, mutual fund investments, grievance redressal mechanism, etc. A total of 244 programs were conducted which were attended by 13574 participants during WIW. Investor Associations ('IAs') which are recognized by SEBI have also conducted investor awareness programs in Tier II and Tier III cities/ towns and such programs covered basic concepts of investing in securities market, mutual fund investments, grievance redressal mechanism, etc. IAs conducted 3 programs covering 425 participants during WIW.
3. SEBI has been reaching out to potential investors and masses through an innovative model, namely, Resource Persons (RPs) to promote financial education across various target groups. More than 1300 RPs are currently trained and empanelled by SEBI in more than 568 districts in 29 States and 7 Union Territories. During WIW, SEBI empanelled Resource Persons conducted 593 programs which were attended by 27,751 participants. These programs covered teaching of basic financial concepts relating to various financial sectors, viz. banking, insurance, capital market, pension, caution against ponzi schemes, Indian government's various savings programs, viz. Jan Dhan Yojana, Atal Bima Yojana, etc. RPs conducted programs in the local language of the particular area and financial education booklets were distributed free of cost to the participants attending these programs.
4. During WIW, SEBI also conducted programs called "Visit to SEBI" where group of students from college, schools and professional institutes visited SEBI offices located across India to learn about securities market, SEBI and its role as regulator of the securities market. During this week, around 21 such programs were conducted covering 835 participants.

Further, enclosed herewith is an Annexure containing the format of bilingual banners which were displayed across all the offices of SEBI and all offices of SEBI recognized Stock Exchanges and Depositories, about celebration of WWI. The following Ticker about observance of WIW was also run on the website of SEBI (www.sebi.gov.in), investor website (www.investor.sebi.gov.in) as well as the websites of Stock and Commodity Exchanges and Depositories:

"World Investor Week Oct 2 - 8 2017 being Celebrated under aegis of IOSCO and SEBI."

Annexure

Banner on celebration of WWI

WORLD INVESTOR WEEK 2017

October 02-08, 2017

AN INFORMED INVESTOR IS A PROTECTED INVESTOR

Plan and invest according to your needs and goals.



भारतीय प्रतिभूति और विनियम बोर्ड
Securities and Exchange Board of India



WORLD INVESTOR WEEK 2017

National Coordinator:

Other IOSCO members:

Other participants:

Indonesia Financial Services Authority (IFSA) held the World Investor Week (WIW) 2017 in collaboration with Indonesia Stock Exchange (IDX), Indonesian Central Securities Depository (KSEI), Indonesian Clearing and Guarantee Corporation (KPEI), and capital market industry from 2nd-8th October 2017. The event consisted of 3 stages, which are pre-event (building people's awareness on investing in capital market industry through campaign on social media and popular radio channels), the main event (capital market education for banking employees hosted by Sekolah Pasar Modal (SPM) or Capital Market School for Banking Employee and IDX, Kumpul Besar (Beli Saham Rame-Rame/ Investor Education goes to campus), and Fun Walk in Car Free Day, and the post event (Investival/ Indonesia Investment Festival, and event review and report).

Detailed informations of the event are as follows:

1. Financial education talk shows on popular radio channels in Jakarta
 - a. Hard Rock 87,6 FM Jakarta in September 28th, 2017, which targeted youth (20-34 years old who has ABC Social Economic Status (SES) with total 329.000 listener*.
 - b. i Radio 89,6 FM Jakarta in October 3rd, 2017, which targeted professionals (21-35 years old who has ABC Social Economic Status (SES) with total 932.000 listener*.
 - c. Radio Dangdut Indonesia (RDI) 97,1 FM Jakarta in October 6th, 2017, which targeted middle low income society (20-40 years old who has BCD Social Economic Status (SES) with total 1.652.000 listener*.

*Datas are based on Nielsen Radio Audience Measurement 2017

We received positive responses from the radio listeners, and their enthusiasm by asking further related information about investing in capital market (how to make a transaction, how to buy a product, the benefits of investing in capital market, avoiding illegal investment, etc).

2. Capital market education for bank employees by Sekolah Pasar Modal (SPM) or Capital Market School. The purpose of this program was to give capital market education to bank employees since most employees in banking industry had not have enough information about the capital market industry nor invested their money in capital market. Knowledge of investing in capital market is important because some companies have a policy to give some bonus by Employee Stock Allocation (ESA). There were 5 banks (Bank Muamalat Indonesia, Bank Mandiri, Bank Negara Indonesia, Bank Central Asia, Bank Rakyat Indonesia) and Indonesia Banking School participated in this event.

3. Kumpul BESARR (Beli Saham Rame-Rame/ Investor Education goes to campus), are the education event held in campus or university, with a purpose to educate college students about capital market industry. The events were successfully held at STIE Mikroskil Medan on October 4th, 2017 and UIN Antasari Banjarmasin on October 6th, 2017.
4. Fun Walk on Sunday Car Free Day in the main road of Jakarta city, successfully held on October 8th, 2017 in Jakarta. There are 293 participants from OJK, Self-Regulatory Organization (SRO), securities companies, youth investor community, and administrators of Galeri Investasi/ Investment Gallery.
5. Social Media Campaign on Facebook, Instagram and Twitter. We developed education campaign materials, in order to rise public's awareness targeted to millennials generation. The campaign in social media developed with a simple content along with an interesting illustration. We also provide quizzes on social media about capital market. We also created a national hashtag for this campaign i.e: #MuterDuit, #YoKePasarModal, #WorldInvestorWeek2017, and #WIW2017. Detailed information about response of the audiences for this campaign during 2nd -8th October 2017 are as follows:

No	Social Media	Reach*	Engagement**	Impression***
1	Facebook	4.864	131	
2	Twitter			80.900
3	Instagram	11.506	505	14.244
Total		16.370	636	95.144

Note:

*Reach: the number of unique account who saw the post .

**Engagement: the number of times the post was liked, saved, and commented on

***Impression: the total number of times the post has been seen.

WIW event will be an exciting annual activity, it just needs a better preparation to be held in a more massive and varied activities. In the case of Indonesia, social media campaign is an effective delivery channel media that can attract more audience since nowadays people use their gadgets very often to find trending and up to date informations.

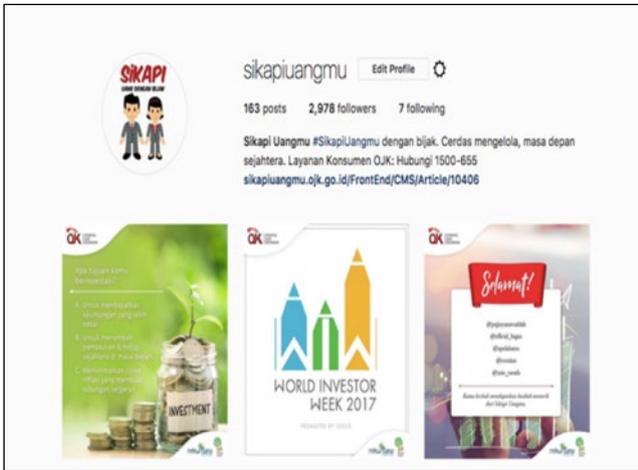


Sikapi Uangmu
Published by Gita Nova (Y) · October 4 at 7:22pm · 🌐

Untuk menghadapi kebutuhan di masa-masa sulit, usahakan untuk menyisihkan 10-30% dari pendapatan perbulan untuk ditabung. 70% sisanya bisa digunakan untuk biaya kebutuhan pokok dan lainnya. Namun, untuk mendapatkan manfaat yang lebih besar dari menabung, kamu bisa #AloKerDuit dengan cara berinvestasi ke pasar modal. Dengan begitu, modal pasif yang kamu setorkan akan menjadi modal aktif yang keuntungannya dapat dipergunakan untuk membayar banyak hal. #yoKePasarModal #WorldInvestorWeek2017 dan cari tahu semua tentang pasar modal!



781 People Reached		
22 Likes, Comments & Shares		
14 Likes	13 On Post	1 On Shares
0 Comments	0 On Post	0 On Shares
8 Shares	4 On Post	4 On Shares
25 Post Clicks		
3 Photo Views	0 Link Clicks	22 Other Clicks
NEGATIVE FEEDBACK		
<input type="radio"/> Hide Post	<input type="radio"/> Hide All Posts	
<input type="radio"/> Report as Spam	<input type="radio"/> Unlike Page	
Reported stats may be delayed from what appears on posts		



WORLD INVESTOR WEEK 2017

National Coordinator: Israel Securities Authority.

To mark the World Investor Week 2017 (2-8 October 2017), promoted by the International Organisation of Securities Commissions (IOSCO), ISA has conducted various activities focusing on media promotion to encourage the public to be active, show responsibility and to understand that knowledge is power.

World Investor Week Activities and Events carried by ISA:

- A. Creative postcards with relevant messages, were placed in public places (restaurants, cafes, cultural institutions etc.), as well as shared on social media, alongside the images with the key messages created by the WIW C8 WG.
- B. Interviews with ISA representative – the spokesperson and Head of Investor Education Unit. For example, an interview was published in the most popular newspaper in Israel. In addition, a special double-page spread in the middle of a newspaper of a "game board" with questions about financial literacy, financial habits and economic conduct.
- C. ISA's spokesperson and Head of Investor Education Unit was interviewed on a morning talk show on TV. The aim of the interview was to raise awareness of the global campaign and to discuss WIW key messages, with focus on warning against unregulated investments and to invite the public to our seminars and workshops.
- D. The ISA announced the beginning of the third year for "Investing in the future" – financial education workshops held across the country.
- E. A conference for senior citizens postponed to November 2017, since WIW was in the middle of the holidays season in Israel.





WORLD INVESTOR WEEK 2017

National Coordinator: Consob

Other IOSCO members: -

Other participants: Bank of Italy; Adeimf; Anasf; Feduf; GLT Foundation; Museo del Risparmio di Torino; QfinLab-Politecnico di Milano; Redooc

The First edition of the World Investor Week (WIW) in Italy has been celebrated with a number of initiatives held between Monday 2 and Saturday 7 October.¹

The main goal of the Italian WIW 2017 was to raise awareness about the relevance of financial education to increase understanding ability and independent judgement when assuming financial decisions in real life.

Focused events on dissemination of financial basic knowledge and experiences were the bulk of the WIW, with a specific emphasis on personal financial planning, sound investment process, notions of financial risk and concept of risk diversification.

The Italian WIW was organised by Consob with the collaboration of Bank of Italy and the participation of many stakeholders active on financial education field as: Adeimf (“Associazione docenti economia, intermediari e mercati finanziari”); Anasf (“Associazione nazionale consulenti finanziari”); Feduf (Fondazione per l’educazione finanziaria e il risparmio”); GLT Foundation; Museo del Risparmio di Torino; QfinLab-Politecnico di Milano; Redooc. The main Italian Universities were also relevant partners of numerous initiatives listed on the calendar. All partners contributed with their resources, contents and professionalism.

Natural targets of the initiatives were young students, University students, some categories of adults (i.e. women) and trainers.

Events were held in many Italian cities, with a wide covering of the national territory. Universities and schools – among the others – opened their doors to many interactive lectures/seminars on financial education. The official list of all the initiatives is still available at the link <http://www.consob.it/documents/11981/0/Calendario+eventi+Wiw/d5f37b08-3237-4b82-a9e7-e64bcbb62696>.

Two initiatives worthy of consideration for their novelty were, among the others:

- A treasure hunting focused on financial education which involved 60 high-school students in Milan at the Politecnico Milano 1863;

¹ A few of them were actually rescheduled for the following week due to last-minute organisational issues

- An on-line competition launched by one of the partner during the week among classes of Italian high schools with the aim at capturing their curiosity by answering to a quiz on financial education.

Consob interacted with partners and other participants (e.g. professors) providing guidance and information support to keep a high degree of homogeneity and harmonization with regard to key messages and spirit of the world campaign.

Information and details about the Italian campaign (e.g. official calendar, list of partners, contact references, related documents and media coverage) were provided in a designated area of the Consob investor education portal (<http://www.consob.it/web/investor-education/world-investor-week>), accessible also through the partners' websites by way of dedicated web links.

Among all the initiatives listed in the calendar, Consob organized the following ones for its part:

- A theatrical show for high school students held by Taxi 1729 focused on behavioral finance and cognitive traps (on Monday 2 October);
- A seminar on investments, competences and decision-making processes alongside the publication of the 2017 Consob Report on financial investments of Italian households (on Wednesday 4 October);
- Two targeted seminars (one for students and one for retail investors, financial advisors and trainers) on behavioral economics (on Thursday 5 October).

Partners' press offices cooperated with Consob to guarantee clear, shared communication policy and messages throughout the WIW, also by means of social networks.

RAI, the Italian national TV broadcaster, dedicated several services and interviews on the WIW during the week. Radio, web and press also provided wide coverage of the events over the week.

Below a selection of pictures taken during the various initiatives in the calendar.









WORLD INVESTOR WEEK 2017

National Coordinator: Financial Services Agency

Other IOSCO members: Japan Securities Dealers Association

Other participants: Japan Exchange Group

One of the characteristics of Japan's initiatives during the WIW 2017 campaign is the active participation of SROs, namely Japan Exchange Group (JPX) and Japan Securities Dealers Association (JSDA).

The overlap of WIW 2017 with our "Securities Investment Day" (4th October) has created very positive synergies, contributing to a wider participation in and acknowledgement of WIW 2017.

1. Japan Exchange Group (JPX)

Japan Exchange Group (JPX) held a special bell-ringing ceremony in Tokyo on 2 October 2017 to open IOSCO's inaugural World Investor Week.

The ceremony began with a video letter from IOSCO C8 Chairman José Alexandre Vasco reiterating the core messages of the campaign and its benefits. More than 100 education and compliance professionals from the industry, as well as overseas exchanges from 12 jurisdictions joined in the celebrations in Tokyo. A closed one-day seminar followed for overseas participants to learn about investor education initiatives in Japan, and also share their experiences and ideas in a highly interactive workshop.

Besides these, there were 2 seminars conducted in conjunction with JSDA's Securities Investment Day, one each respectively targeting elementary school students and young adults.

2. Japan Securities Dealers Association (JSDA)

The JSDA published moving banners displaying the WIW logo and a key message, highlighting the benefit of long-term, regular and diversified investment, on the JSDA's website which links to IOSCO's WIW campaign website.

Also, in collaboration with "Securities Investment Day", the WIW logo and the key message in Japanese were displayed on the top page of JSDA's special website on "Securities Investment Day" and disseminated through media and SNS.

The WIW logo and key message were also disseminated through events related to "Securities Investment Day" held in 30 locations across Japan (6 locations from 2 to 8 October).

Continue on next page

3. Financial Services Agency (JFSA)

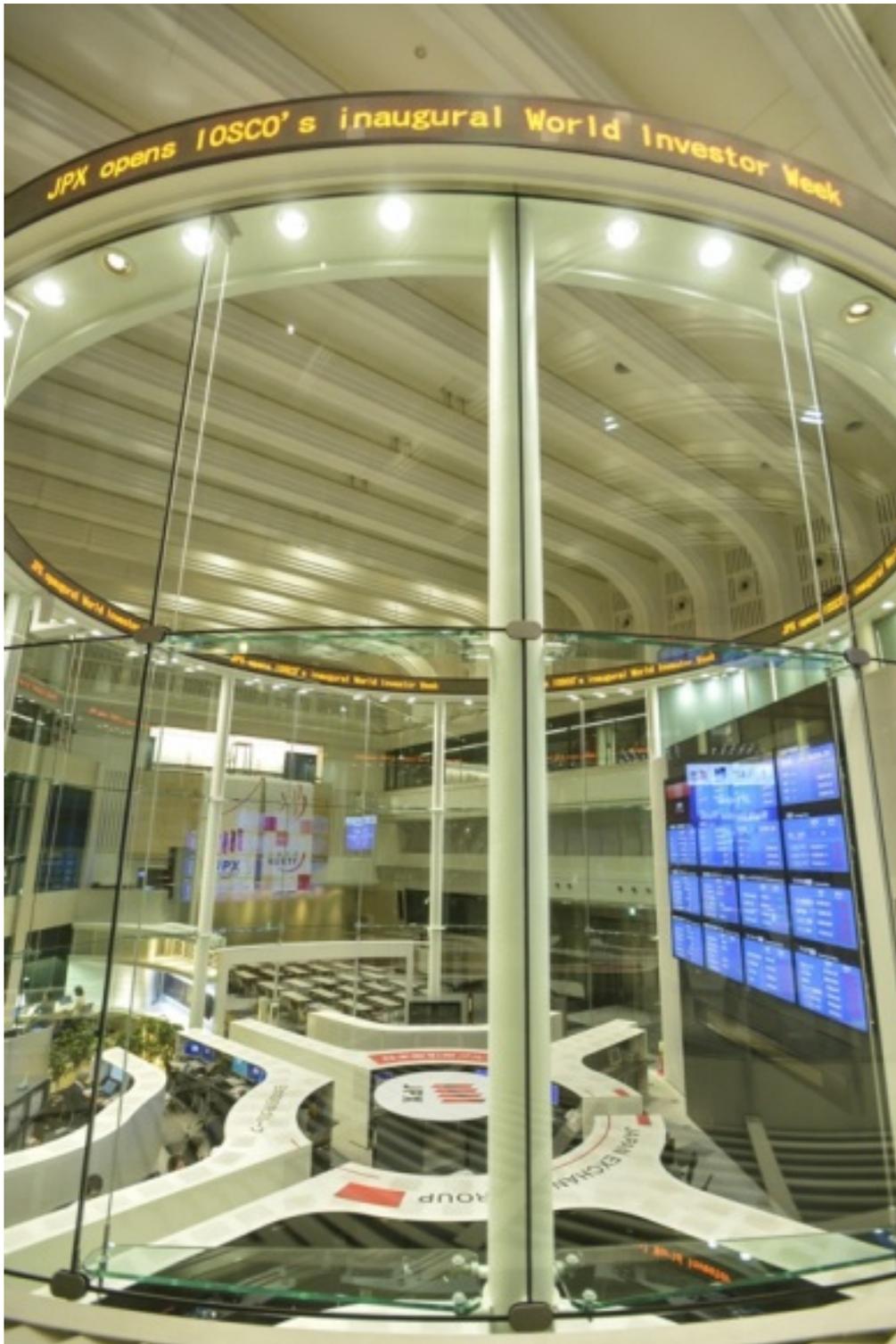
JFSA actively promotes “long-term, regular and diversified investment”, which is also an integral part of the WIW key messages, through our policy initiatives including those on financial education. We actively communicate with retail investors through various channels such as websites, publications, seminars and talks, etc.

We contributed to WIW 2017 as a national coordinator, closely communicating with relevant parties and collaborating with events and seminars held during the campaign period.





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Home | [About JSDA](#) | [JSDA Rules / Guidelines](#) | [Activities](#) | [Statistics](#) | [Securities Market in Japan](#)




[World Investor Week](#)

JSDA works with IOSCO for WIW.

A smart investor recognizes the benefit of long-term, regular and diversified investment

From 2 to 8 October 2017

The Japan Securities Dealers Association (JSDA) is an association functioning both as a self-regulatory organization and as an interlocutor between market participants and various stakeholders including the government authorities. Both functions work independently. JSDA members consist of securities firms and other financial institutions operating securities business in Japan.

- [How Japan Measures Up](#) 
- [Investor Alerts](#) 
- [JSDA Annual Report](#) 
- [JSDA Fact Book](#) 
- [International Events](#) 
- [Japan Securities Summit](#) 
- [Asia Securities Forum](#) 
- [Examination & Qualification](#) 

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平成29年度「証券投資の日」特設サイト

ほんとうに預貯金だけで大丈夫？

投資「する」と「しない」の
未 来 予 想 図

[「未来予想図」診断](#)
[座談会](#)
[イベント情報](#)
[クイズ
キャンペーン](#)
[投資を学ぶ](#)
[証券会社・金融機関
でのセミナー情報](#)

[いいね!](#)
[シェア](#)
[ツイート](#)
[LINEで送る](#)

“お金”と“あなた”を育ててくれる。そんな投資をはじめませんか？



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日本証券業協会
Japan Securities Dealers Association

[English](#) > [サイトマップ](#) > [お問い合わせ](#)

? 日証協とは

用語集

検索

学ぶ

金融・証券に関する学習情報

調べる

各種市場関連の情報

知る

証券会社などの情報

備える

安心して投資するための情報

資料室

統計情報などの各種資料

日証協の活動

会長会見や政策提言など

投資者の方へ

学生・教育関係者の方へ

市場関係者の方へ

報道関係者の方へ




世界投資者週間

日本証券業協会はIOSCOの
世界投資者週間(WIW)に協力しています。

— 資産形成には長期・積立・分散投資 —

開催期間：2017年10月2日～8日

Pick Up Contents

⚠️ 投資者向け 注意喚起

📅 証券会社の店舗・セミナー検索

👤 外務員資格・試験

日本証券業協会の活動

- > 日証協とは
- > 会長会見・談話
- > 定款・諸規則
- > 各種会議体について
- > パブリック・コメント
- > 自主規制について
 - ・ 自主規制の仕組み・規則制定等のプロセス
 - ・ 自主規制活動に関するお知らせ
 - ・ 上場会社の善操へ（J-I R I S S）
 - ・ 協会員への監査
- > 外務員資格・外務員資格試験・外務員必携
- > 政策提言
- > イベント等

WORLD INVESTOR WEEK 2017

National Coordinator: Jersey Financial Services Commission

Other IOSCO members:

Other participants: Jersey Consumer Council, Channel Islands Financial Ombudsman, Trading Standards, States of Jersey Police/Jersey Fraud Prevention Forum

On 27 September 2017, the Jersey Financial Services Commission (JFSC) issued a press release entitled 'JFSC brings World Investor Week to Jersey'. In this document the JFSC explained the background to IOSCO's worldwide initiative and set out the activities being run by it during the course of the week.

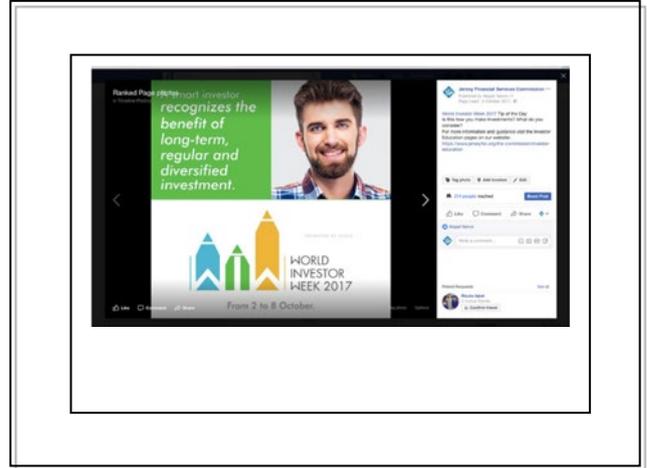
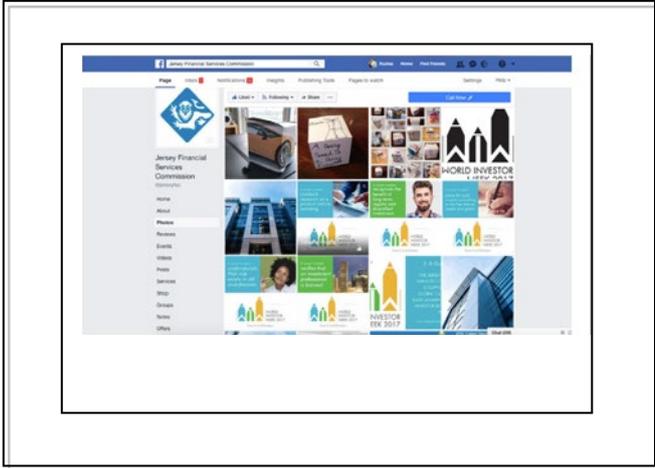
On Monday 2 October 2017, Mike Jones, Director of Policy at the JFSC was interviewed by one of the broadcasters on BBC Radio Jersey during her 'drive time' show between 16:00 and 19:00. During his interview, Mike explained what World Investor Week was all about and explained how the JFSC was involved and what it was doing during the course of the week and beyond in the context of investor education.

The week began with the unveiling of a competition for primary school aged children (those between the ages of 5 and 11) to design their own money box. The JFSC provided templates and the children were encouraged to decorate the boxes with what they would spend their money on once the boxes were full. The aim was to get young people thinking about saving and the benefits of saving. We had a number of very good entries and the results were published on the JFSC's Facebook page on 12 October 2017.

On Wednesday 4 October 2017 the JFSC hosted, in conjunction with the other participants listed above, a drop-in morning at its office for members of the public to come in and find out more about how we can help them. Factsheets were available in relation to various matters such as 'What does it mean if a business is regulated by the JFSC', 'What is risk?' and 'Choosing a Financial Adviser'. In addition, each of the other participants brought along their own materials to share with members of the public.

The JFSC was represented by members of its policy team and members of its supervision team who made themselves available to discuss specific concerns with visiting members of the public.

In addition to these three events, the JFSC was active daily on social media with posts promoting its events and sharing key messages of the day.



WORLD INVESTOR WEEK 2017

National Coordinator: CAPITAL MARKETS AUTHORITY, KENYA

Other IOSCO members:

Other participants:

1. INTRODUCTION

The World Investor Week 2017 (WIW) was a pilot campaign by the International Organization of Securities Commissions (IOSCO) primarily aimed at disseminating key messages that further investor education and protection, as well as financial literacy; and fostering learning opportunities for investors. The secondary objective of the campaign was to strengthen collaboration within IOSCO members and investor education and protection.

The World Investor Week was coordinated by IOSCO's Committee on Retail Investors (C8) on behalf of the IOSCO and the Committee which was mandated to design the campaign, monitor implementation globally and report the results to the IOSCO Board and the public. The C8 will monitor implementation by collecting data from all participating jurisdictions through online questionnaire within a SurveyMonkey template on selected indicators.

Being a global campaign, participating IOSCO members had been provided with a wide variety of activities for implementation in their own jurisdictions, such as distribution and/or promotion of booklets, flyers and other publications, games, software and apps, websites, blogs, and social media profiles; awards, local and national campaigns, press releases, interviews, TV shows, radio programs, newspaper articles among other initiatives, as long as the initiatives were aimed at improving financial literacy or investor education and protection.

2. INITIATIVES BY CAPITAL MARKETS AUTHORITY, KENYA

As a member of the IOSCO, the Capital Markets Authority, participated in the World Investors Week 2017 from October 2-8, 2017 through a combination of several investor education outreach programs to promote greater investor education and protection nationally.

It was envisaged that supporting IOSCO in the WIW will benefit potential and current investors within the Kenyan capital markets as well as demonstrate our commitment at an international level in regard to investor education and protection. In this regard the Authority undertook the following key targeted initiatives:

2.1. Launch of the WIW

The Authority organized for an official launch of the World Investor Week on 29 September, 2017 at the Authority's Conference Room. The event brought together an excellent level of industry participants including the Governor of Central Bank of Kenya Dr. Patrick Njoroge who made informal remarks emphasizing support for the initiative as well as investor education. In his address, the Chief Executive conveyed his sentiments on the continued collaborative efforts with IOSCO in moving the capital markets forward with respect to the recent developments. In addition, the Chief Executive provided an overview of the status of financial sector development and the WIW campaign. He encouraged the intermediaries to participate in Kenya's component of the WIW. The Launch was attended by about 80 key capital markets stakeholders at very senior levels.



World Investor Week 2017 Launch held at the CMA offices Kenya on 29 September 2017. (From left: Mr. Luke Ombara-Director Regulatory Policy and Strategy, Capital Markets Authority, Mr. Bob Karina-Vice Chairman Nairobi Securities Exchange, Dr. Patrick Njoroge-Governor, Central Bank of Kenya, Mr. Paul Muthaura-Chief Executive, Capital Markets Authority, Irene Mutiso, Central Depository and Settlement Corporation and Stephen Muriu Chairman Fund Managers Association during)



Authority's Investor Education & Public Awareness (IEPA) Team pose for a photo with their Chief Executive, Mr. Paul Muthaura during the Launch. (From Right: Kamunyu Njoroge-Manager, Investor Education and Public Awareness, Esther Gitonga-, Investor Education and Public Awareness Officer , Lucy Njaramba – Senior, Investor Education and Public Awareness Officer, Konrad Afande - Assistant Manager , Investor Education and Public Awareness, Halkano Huqa - , Investor Education and Public Awareness Officer and Joshua Gichiri – Senior Officer Knowledge Management)

2.2. Social Media Campaign during the WIW

The Investor Education and Public Awareness department, in collaboration with Corporate Communications department undertook heightened social media campaign through boosting short educational messages on opportunities, products and services within the capital markets as well as investor protection techniques in form of short videos, infographics, illustrations and memes i.e. pictures with messages on them.

Between 29 September, 2017 and 8 October, 2017 a total of 356 posts were uploaded on all social media platforms. All posts were themed around the concept of being a wise investor. Some of the topic covered included: Who a wise investor is; A Beginner's Guide to Investing; Capital Markets Resource Centre Portal; Whistleblower Portal; Capital Markets Fraud Investigation Unit; Benefits of listing in the capital markets; Available products; CMA Service Charter; Complaints Handling Procedure; Investor education

events; and the Scavenger Hunt among others. These created a platform for discussions on Social Media targeting the youth between 18 and 34 years old and it was evident that the campaign was a success given the number of people reached on Facebook, impressions, interactions, video views and the increased website traffic as highlighted below.

2.2.1. Facebook

On Facebook, the Authority reached 479,614 people during the campaign period. A total of 46,811 post engagements were recorded on the platform. The Page followers on Facebook grew by 8,861 to the current followers standing at 49,536. Content on the page received 6,009 likes and the videos uploaded during the campaign had a total of 122,365 views as of 9 October, 2017.

Seventy five (75) percent of the Facebook followers are men while 25 percent are women. Out of this 48 percent constitute people between the ages of 18-24, 34 percent constitutes peoples ages 25 -34, 8 percent are aged between 35 -44, while 9 percent are 65 years and over. Followers between ages 45-64 were one percent. 45,492 followers are from Kenya with 89 percent of them from Nairobi. Other followers reside in Uganda (121), United States (119) among many other countries.

The Authority also put content on Instagram through a partnership between Facebook and Instagram. The use of Instagram increased the Authority's reach significantly through the promotions of the memes and the illustration.

2.2.2. Twitter

On Twitter 170 tweets were shared during the period under review. A total of 3,401,000 impressions (total number of views of a conversations/tweet) were generated. A total of 344 retweets, 617 likes and 40 replies were recorded. The number of followers on Twitter grew by 1,214 to the current following of 3,314.

On this platform 79 percent of the total followers are male while 21 percent are female. Sixty three (63) percent of the followers are between ages 25 to 34, while ages 18 -24 compose 19 percent of the total followers and 12 percent of the followers are between ages 35-44. Eighty Seven (87) percent of the followers are from Kenya, 2 percent from United States and Uganda each. The rest were from other countries, among them were; Tanzania, Rwanda, United Arab Emirates and South Africa. In Kenya 43 percent were from Nairobi, 5 percent from Central Kenya, 4 percent from the Rift valley, 3 percent from coastal Kenya and 2 from Eastern Kenya. It was noted that mobile is the device of choice for many of these followers.

2.2.3. LinkedIn

Seventy seven (77) organic posts were uploaded on LinkedIn. Organic posts are those uploaded that are not paid for and are only shared with your page followers. This post received a total of 14,948 impressions and 105 interactions on the platforms. An interaction on this platform refers to the like, shares or comments. The demographic on LinkedIn indicated that most of followers were either working in the financial service industry, capital markets or the banking sector. Most of the followers are from Kenya, Kuwait, India, United States and Egypt. Finally more people viewed the Authority's page via a desktop compared to those on mobile phone.

The table below summarises the growth in the number of followers during the WIW campaign period.

	Facebook	Twitter	LinkedIn
Number of follows after the campaign	49,536	3,314	1,242
Number of follower before the campaign	40,675	2,100	1,194
Number of new followers	8,861	1,214	48

2.2.4. Website

Visitors to the Authority's website from the social media networks accounted for 1,894 people. It is worth noting that the time bands with the highest traffic to the Authority's website were between 8.00 am – 10.00 am and from pm onwards. The increased website hits were attributed to the heightened social media boost meant to create awareness of the 'scavenger hunt' competition in the Authority's Resource Centre Portal, one of the campaigns undertaken during the WIW. More details on the scavenger hunt are provided in 2.4 below.

2.2.5. Videos

The Authority developed and uploaded two videos during the World Investor Week. The two videos were each less than two minutes and received a total of 210,000 views on Facebook. Boosting the video enabled the Authority to increase the reach to more people outside our Facebook followers. We also uploaded previously produced documentaries on social media to increase the reach of the content.

2.3. Print Campaign

The Authority ran an advert on print media on October 3, 2017 highlighting the World Investor Week as well as provided an update on ongoing developments within the capital markets. The advert was placed in two major local dailies the Standard newspaper (the second newspaper with national coverage in the country) and in The Star Newspaper (a newspaper targeting urban and peri-urban regions within the country).

2.4. Resource Centre Portal Campaign from 2-8 October, 2017

In commemoration of the World Investor Week, the Authority carried out a 'Scavenger Hunt' for information that was only located in the Authority's Resource Centre Portal in order to promote investor education and use of the Capital Market Resource Portal. The scavenger hunt competition was held from 2-8 October, 2017, and encouraged the public to interact with Authority's Resource Centre Portal and learn more about the capital markets.

Incentives were offered through a raffle to the participants who successfully completed a questionnaire prior to exiting the portal. The prizes won would be invested in M-Akiba, a mobile based platform of investing in the bonds and they were as enlisted below;

1. First prize: Kshs 30,000.00 to buy M-Akiba Bonds
2. Second Prize: Kshs15,000.00 to buy M-Akiba Bonds
3. Third Prize: Kshs5,000.00 to buy M-Akiba Bonds
4. Forty nine (49) Consolation prizes of Kshs3,000.00 each to buy M-Akiba Bonds

The scavenger hunt competition came to an end on 8 October, 2017, having attracted a total of 2,316 participants. Out of these, 226 participants scored 100 percent, while 89 participants scored 80 percent, 146 participants scored 60 percent, 211 participants scored 40 percent, 228 participants scored 20 percent, 57 participant's scored 0 percent and 1,359 people made no attempt to answer the questionnaire. Most of the participants were either professionals, students or business people. Out of the competition, a database of 2,316 people was generated for purposes of future targeted investor education programmes.

2.5. National Radio Campaign

that The vernacular radio stations in Kenya have played a key role in educating and informing a largely uninformed populace that neither speak nor understand Kiswahili and English, the two national languages in Kenya. The Authority sent some of its staff

members to visit two vernacular and one urban radio stations during the campaign period providing various capital markets information on investing and protection. The Radio stations used during these campaigns included; Kass FM targeting the populous Kalenjin community in the Rift-valley and Muuga FM targeting the Ameru Community in the Central and Eastern part of Kenya. Lastly, the Radio Citizen was used in covering the urban population. Radio Citizen happen to be the biggest National Radio by listener affinity and audience measurement and command over 40% of Kenyan radio listeners every week across different timeslots.

2.6. Huduma Centre Initiatives

A 'Huduma Centre' is a 'one stop shop' designated for purpose of public service delivery in Kenya. Huduma Centres provide customer services to citizens from a single location and/or online e-Huduma web and mobile portal that provide integrated services offered by various government ministries, departments and agencies and a unified and an integrated Huduma payment gateway that facilitate ease of payment for government services. Some of the services provided include issuance of national identity cards, issuance of birth certificates, registration of business names, applications of business licences, drivers' licences, police abstracts and amongst other services. There are various Huduma Centres throughout the country and the Authority has been collaborating with the Centres for purposes of creating awareness and educating the general public visiting the Centres.

During the WIW, the Authority partnered with two Huduma Centres by sending representatives to visit Eldoret Huduma Centre and Meru Huduma Centre. This was to provide face-to-face interactions with potential investors, enhance their understanding of the capital market and sensitize them to make conscious efforts in saving and investment opportunities available.

2.6.1. Eldoret Huduma Centre

The Capital Markets Authority held investor education and market awareness forums at the Eldoret Huduma Centre, Uasin Gishu County on 5 & 6 October, 2017. The sessions were put in place to educate and increase awareness of the capital markets and bring to the attention of the members of the public opportunities available for investing in the capital markets. In addition, the forums were meant to provide a one on one interface of the Authority with the members of public and also those working at the Huduma Centre.

On day one, Thursday, 5 October, 2017, there was an open forum from 8.30 am to 5.00 pm at the Eldoret Huduma Centre. The Authority's two representatives talked to 122 members of the public who streamed in at the Centre for different services.

On the second day, Friday, 6 October, 2017, a special forum for 50 Huduma Centre staff was held from 7.00 am to 9.00 am when the doors were opened to the public for an open forum. During the one on one discussions with the public, a total of 121 members

visited the Authority's desk and majority were passionate to learn more about the Authority, capital markets and investment opportunities. The two Authority's representatives were instrumental in providing the much-needed information.



Two of the Authority's Representatives educating members of the public at Eldoret Huduma Centre. [Left to Right: Geoffrey Rutto of IEPA (Seated in the Middle) and Nebart Avutswa, CMA's Resource Person (seated third at the end towards the right)]

2.6.2. Meru Huduma Centre

The Authority's representatives visited the Meru Huduma Centre in Meru County on 5 & 6 October, 2017 and had investor education sessions with 118 and 90 members of the public visiting the Huduma Center on both dates respectively. To catch the attention of the members of the public who had come to seek specific services provided at the Huduma Centre, the CMA team pitched tent at the main entrance and one was located inside the service hall to capture those walking past the tent. For clear visibility of the team's activities a CMA and the World Investors Week banners were conspicuously displayed at the main entrance and inside the Huduma Centre Hall.



One on One Session between one of the Authority's Representatives and Members of the Public at Meru Huduma Centre (Halkano Huqa - CMA's Investor Education Officer (seated right) educating members of the Public at the Centre)

From the two Huduma Centre visits, the Authority recorded a total of seven complaints from investors who heard the advertisement on radio and created time to have their issues taken up by the Regulator.

2.7. Youth Outreach

The Authority hosted 60 students from Kitale Technical Institute on 2 October, 2017, for an investor education forum at the Authority's offices. The forum was attended by about 45 students of Accounting and Finance who were taken through presentations on the role of the Authority, the available investing opportunities and products as well as investor protection.

In addition, the Authority sent two staff members to Riara University for a speaking engagement at a forum themed 'Financial Markets Awareness and Career Planning', organized by the University on 4 October, 2017. The forum targeted the School of Business students and the key objectives of the event were to enlighten the student on the Kenyan and International Financial Markets, Risks and Compliance in the Financial Markets as well as to prepare the students for a career in the financial markets. Other presenters besides the Authority included representatives from CBA Capital Limited, Africa Risk Institute and Chartered Institute for Securities & Investment (CISI). The forum was attended by about 70 students.

The Assistant Manager, Investor Education and Public Awareness, Mr. Konrad Afande made a presentation on 'An exploration of Kenyan and International Financial Markets'. The presentation covered an overview of the Authority, the global financial markets, financial markets in Kenya and benefits of investing in the capital markets. In addition, the presentation provided an overview of the World Investor Week and the initiatives the Authority was undertaking, key among them was the Scavenger Hunt on the Resource Centre Portal. The students were encouraged to participate in the scavenger hunt.



Mr. Konrad Afande making a presentation to the School of Business Students at Riara University.



Some of the Participants during the Riara University presentation.



Some of the Participants during the Riara University presentation.

2.8. Board of Registration for Architects and Quantity Surveyors (BORAQS) Forum

The Board of Registration of Architects and Quantity Surveyors (BORAQS) is the body that regulates the professions of Architecture and Quantity Surveying in Kenya through training, registration and enhancement of ethical practice. The Board had organized a Continuous Professional Development (CPD) conference for its registered Architects and Quantity Surveyors on 20 September 2017 in Nairobi and the Authority was invited to make a presentation on capital markets during the conference. The Chief Executive of Authority made presentations on the opportunities and products available for investments in the industry. During the forum, the members of the board exuded a lot of confidence in the market and their willingness to learn and invest. There was call for more sessions with the members on demystification of the capital markets products and opportunities. The conference, which was attended by 200 members, provided an opportunity for CMA to provide information on raising capital with emphasis on products such as REITs.

The Authority also had an exhibition stand where interested members of BORAQS sought further clarification on various issues around capital markets. The Authority's staff at the exhibition stand were instrumental in providing one on one clarifications to about 30 members who visited the stand.



Some of the Participants during the BORAQS conference held at the Safari Park Hotel, Nairobi.



Mr. Paul Muthaura, CE, Capital Markets Authority making his presentations to BORAQS Conference Participants.

3. MONITORING AND EVALUATION

The campaign will be evaluated from each jurisdiction through Survey Monkey by C8 WIW working group and reported back to IOSCO. The focus of the survey will be on output measures which will include number of events, attendees and participants reached; outcomes which will measure the audience response through local surveys; and impact measures, which although difficult to ascertain, will be gathered from survey responses..

Locally, the Authority used evaluation forms issued to participants during some of the forums, social media data on the number of people reached on Facebook, new followers, content on page likes, number of twitter impressions, retweets, likes, replies and twitter followers, LinkedIn impressions and interactions on the platforms.

In addition, the Authority monitored the Authority's website traffic during the campaign, number of people who participated in the scavenger hunt competition and the numbers that attended various forums during the WIW. Newspaper cuttings were preserved and recordings from Radio stations obtained for the Authority's records.

4. CONCLUSION

Being the first, the WIW was a success given the number of events undertaken, the participants reached as well as audience responses in the evaluation forms provided during some of the forums. Considering the outcome of the initiatives undertaken by the Authority and the WIW 2017 being an inaugural campaign, it is believed that future WIW events would yield more success now that awareness has been created.

WORLD INVESTOR WEEK 2017

National Coordinator: Securities Commission Malaysia (SC)

Other IOSCO members: None

Other participants:

- a) Securities Industry Dispute Resolution Centre (SIDREC)
- b) Malaysian Financial Planning Council (MFPC)
- c) Financial Planning Association Malaysia (FPAM)
- d) Private Pension Administrator Malaysia (PPA)

SC Malaysia is pleased to have participated in IOSCO's pilot World Investor Week (WIW) campaign from 2nd – 8th October 2017. As the National WIW Coordinator, SC Malaysia lent its support by undertaking 4 activities in conjunction with WIW. We were also able to obtain the participation of our affiliates in furthering the objectives of the campaign, thus ensuring its effectiveness.

SC Malaysia's Activities during WIW

1) Screening of an Anti-Scam Awareness Video

An anti-scam awareness video called "T.I.P.U" was screened at major cinemas nationwide from 28 September – 11 October 2017. During the 2-week campaign period, all movies at the cinemas featured the T.I.P.U. video prior to the movie screenings. The 30 second public service message highlights the modus operandi of scammers and aims to inform the public on where to seek further information or assistance when in doubt. Fifteen cinemas nationwide screened the T.I.P.U video which ended with a frame showcasing SC Malaysia as well as the WIW logo. The video was also disseminated to SC Malaysia's stakeholders in order to leverage their respective communication channels and social media assets.



Screen grabs from "T.I.P.U" video by SC Malaysia

2) Facebook Live Chat Session on Financial Planning

For the first time, SC Malaysia organized a Facebook Live Chat panel discussion in conjunction with WIW. The panel discussion themed 'FinPlan4U – A Step Towards Financial Health And Wellness' saw a lively discussion on the benefits of engaging a financial planner. Our panel members comprised of representatives from SC Malaysia, a financial planning association and an award winning financial planner.

The 30 minute FB Live Chat session was viewed by over 1500 people.



FinPlan4U Facebook Live Chat Session Panelists and Team

3) Social Media Messaging on WIW

In raising awareness of WIW, SC Malaysia had utilized its social media platforms such as Facebook, Instagram and Twitter to post daily educational messages. A total of 16 posts as suggested by the WIW Secretariat were uploaded from 18 September to 7 October 2017. These posts captured the attention of approximately 63,000 followers.

4) Issuance of Press Release

A press release was issued on 5 October 2017 titled *SC Promotes IOSCO's World Investor Week*. The news piece was picked up by local and international publications through online and print media.

WIW Participation by SC Malaysia's Associates and Stakeholders

In recognizing the impact of digital and social media in reaching out to investors, most of SC Malaysia's associates and stakeholders had utilized its online platforms as an effective means of spreading awareness on WIW 2017.

a) Securities Industry Dispute Resolution Centre (SIDREC)

Besides featuring the WIW logo on the SIDREC website and Facebook posting, SIDREC also disseminated daily educational messages on its website for 9 days commencing 1 Oct.



b) Malaysian Financial Planning Council (MFPC)

MFPC organised an event titled “MFPC Professional Ethics Conference” on 4 October 2017. All collaterals for the event featured the WIW logo. The WIW logo was also featured on their website and Facebook page. Approximately 240 people attended the 1-day conference.



MFPC Professional Ethics Conference held at SC Malaysia

c) Financial Planning Association Malaysia (FPAM)

Apart from participating as a panelist in SC Malaysia’s Live Facebook Chat (as mentioned above), FPAM also featured the WIW logo on their website and Facebook page.

d) Private Pension Administrator Malaysia

PPA, similar to the affiliates above, participated in WIW by featuring the WIW logo on their website and Facebook page.



WORLD INVESTOR WEEK 2017

National Coordinator: Abdullah Zakariyya, Capital Market Development Authority.

Other IOSCO members:

Other participants: American Centre, Maldives; The Maldives National University, Women on Board

To mark the World Investor Week 2017 (2-8 October 2017), promoted by the International Organisation of Securities Commissions (IOSCO), CMDA has conducted various activities focusing on creating awareness about the capital market and Islamic finance. In addition, CMDA worked on disseminating information about the initiatives of CMDA with regards to education and training activities.

World Investor Week related programmes were facilitated by local experts in the area including, Dr. Aishath Muneeza, the chairperson of Capital Market Sharia Advisory Council (CMSAC), and Mr. Ali Munavvar from the Maldives Centre for Islamic Finance and staff of Capital Market Development Authority. The programmes conducted have trained more than 70 persons in the area of capital market and Islamic finance.

CMDA is grateful for the collaboration and assistance from The Maldives National University, Maldives Centre for Islamic Finance, Women on Board and American Centre.

World Investor Week Activities and Events carried by CMDA

The programmes included a quiz shared via Facebook that was open for the general public, information sessions to university students, the general public and a workshop on investing in the capital market and trading in financial securities in the secondary market.

1. CMDA Facebook Quiz (2- 8 October 2017)

The Quiz is open to individuals owning a personal Facebook account in the Maldives. The Quiz took place between 2nd October to 8th October 2017. A question was posted on official Facebook Page of CMDA on each day of the WIW. The questions were in the form of multiple choice and True/False statements. There were 38 users who have participated in the quiz and a single winner was selected through draw among the participants who have obtained the highest score. The winner of the quiz is Ms. Aishath Thahaani Rasheed. CMDA awarded the winner a grand prize consisting of a cash prize of MVR 1,000 (One Thousand Rufiyaa) and Ooredoo Data Dongle with 20 GB Data sponsored by Ooredoo Maldives Plc.

2. “Awareness Session on Capital market and Islamic Finance” for the students of Faculty of Education, Maldives National University

Capital market and Islamic finance programmes for the university students targeted aspiring teachers of Accounting, Business Studies and Economics from the Faculty of Education of the Maldives National University. This half-day session was conducted on the 3rd October 2017 and the session was focused on how stock market works in the Maldives and the current state of Islamic finance in the Maldives. A total of 31 participants completed the session from which, 28 participants were undergraduate teaching students and 3 lecturers.

3. “Awareness session on Islamic Finance” for the students of Faculty of Islamic studies, Maldives National University

This half day session on Islamic financial and Islamic Finance contracts was conducted for the students of Faculty of Islamic Studies of the Maldives National University on 7th October 2017. A total of 28 students completed the programme.

4. Programme on Trading and Investing in Securities for general public

This half day programmes for the general public was conducted on 8th October 2017 at American Center, Male' as a collaborative activity with Woman on Boards (WOB) and American Center. The purpose of this programme is to create awareness on trading and investing in securities on secondary market. A total number of 15 participants completed the programme.

5. Awareness activities for the islanders of K. Atoll Maafushi

The purpose of the trip is to create awareness about savings and investment in rural communities. Savings and investment opportunities at the local and country level in order to get a better return for the savings. This was done through two programmes focusing on women development committee of K. Maafushi and employees from different institutions such as Island Council, Police Station of K. Maafushi and other government institutions.



Program on Trading and Investing in Securities
8th October 2017







WORLD INVESTOR WEEK 2017

National Coordinator: Comisión Nacional Bancaria y de Valores

Other participants: Bolsa Mexicana de Valores, Asociación Mexicana de Instituciones Bursátiles, Asociación de Bancos de México, Instituto Para la Protección del Ahorro Bancario.

In Mexico, the World Investor Week (WIW) was held at the same time that the National Financial Education Week. CNBV organized in its stand different activities related to financial inclusion and education, and for the first time, included activities regarding investor protection and education. For this event, the CNBV printed and circulated a brochure that was a basic guide on how to invest in the securities market, which included some recommendations for investor protection. More than 1,000 brochures were distributed in the stand.

Also, the CNBV produced a video with musicians of the Orquesta de Minería, an important orchestra in Mexico, that acted as spokespersons of the WIW by providing and explaining the IOSCO key messages for investor education and protection. The video was shown in CNBV stand for the National Financial Education Week, and was seen by more than 74,857 attendants to the event. The video was also uploaded to the CNBV website, YouTube channel and Twitter.

Additionally, CNBV implemented a WIW Twitter campaign and created interactive material, like short videos and infographics, that contained key messages for investor protection. In summary, 39 tweets were published in the two official CNBV Twitter accounts, two videos and two infographics were published with more than 54,000 organic impressions, 218 retweets, and 280 favs. One video had more than 3,500 views. Our partners help us distributing these material through their social media.

The Mexican Stock Exchange (BMV) partnered with the CNBV to organize a conference on Investment Services and Sales Practices, given by the General Manager for Supervision of Conduct of Market Participants who explained details on the new regulation for this services, including reasonability of recommendations, portfolio diversification criteria, investors' investment profile, financial product suitability; information provided to investors, and the committees of product analysis and the person responsible for the supervision of investment services.



¿Cómo invertir y ser parte del Mercado de Valores?

Antes de invertir en el mercado de valores, es importante **entender los productos financieros, sus riesgos y rendimiento**. Para conocerlos considera lo siguiente:

- Verifica que la persona o la entidad de quien recibes cualquier servicio de inversión esté debidamente autorizada por la CNBV.
- Diversifica tus inversiones. Que tu dinero se invierta en más de un producto financiero.
- Investiga qué servicio de inversión te proporcionan las distintas intermediarias o personas autorizadas. Pueden ser asesoradas (asesoría o gestión) o no asesoradas (ejecución o comercialización).
- Al invertir, es importante planear, definir objetivos, evaluar tu situación financiera y buscar asesoría.
- El rendimiento y el riesgo siempre van de la mano: si el producto financiero o la inversión ofrecen altos rendimientos, el riesgo seguramente será elevado.

Para invertir en el mercado de valores no necesitas ser experto, pero sí estar **informado** y **asesorado** por especialistas autorizados.




WORLD INVESTOR WEEK 2017

National Coordinator: Autorité Marocaine du Marché des Capitaux AMMC
(Moroccan Capital Market Authority)

Other IOSCO members:

Other participants:

OVERVIEW

L'Autorité Marocaine du Marché des Capitaux (AMMC), member of IOSCO since 2007, showed his whole fully support for the first edition of the World Investor Week 2017, by organising a big event who confirm the commitment of the Moroccan regulator in terms of investor education and protection.

This event was organised in the most prestigious university in Morocco, located in the capital Rabat, and allowed to over 250 students and professors to have a direct interaction with major market players.

The structure and function of Moroccan capital market was the guiding theme of this conference held on Thursday, October 5, 2017, in partnership with Faculty of Economics Sciences of Rabat. The event covered a wide array of topics relating to the capital market regulation in Morocco, the roles and functions of stock exchange and Maroclear (the central security depository of securities).

Event type	Conference debate
Topic	Moroccan capital markets: function & development prospects
Date	5th October 2017 From 2.30pm to 6.30 pm
Venue	Faculty of Economics Sciences Mohammed V University – Rabat – Morocco
Content	The capital market regulation framework in Morocco The roles and functions of stock exchange and Maroclear Stock market development and financial intermediaries The UCTIS as savings management tool
Speaker profile	AMMC Casablanca Stock Exchange Maroclear Professional associations (APSB and ASFIM)
Attendees profile	250 participants: - 80% students - 15 % professors - 5% VIP guests
Media coverage	+30 articles

COMMUNICATION MATERIALS

• Press release



Rabat, le 02/10/2017

COMMUNIQUÉ DE PRESSE

L'AMMC participe à la première édition de la « World Investor Week », aux côtés de plus de 70 régulateurs, et confirme son engagement pour l'éducation financière et la protection des investisseurs.




L'Organisation Internationale des Commissions de Valeurs (OICV), lance la première édition de la « World Investor Week ». Du 2 au 8 octobre 2017, plus de 70 régulateurs de monde entier dont l'Autorité Marocaine du Marché des Capitaux (AMMC), prennent part à cette messe internationale.

Consciente de l'importance de l'éducation financière en tant que levier de la protection des épargnants et de l'intégrité des marchés, l'AMMC, membre de l'OICV depuis 2007, soutient pleinement à cette initiative.

L'AMMC a en effet placé l'éducation financière au cœur de son plan stratégique 2017-2020 avec la mise en œuvre de plusieurs actions d'urgence à court, moyen et long terme. Parmi ces actions, figurent notamment la création d'une unité dédiée à l'éducation financière, le développement de plusieurs supports de communication (guides didactiques, animations vidéos, médias digitaux) ; l'organisation d'événements dédiés, le développement de partenariats avec les établissements scolaires et universitaires ainsi que nombre d'autres actions qui se déploieront progressivement.

A l'occasion de la « World Investor Week », l'AMMC organise le jeudi 5 octobre 2017, en partenariat avec la Faculté des Sciences Juridiques, Economiques et Sociales de Rabat-Agdal, une rencontre avec les étudiants sous le thème « Le marché des capitaux marocain : fonctionnement et perspectives de développement ». Aux côtés de l'AMMC, participeront également les entreprises de marché (la Société de Cassablanca et le Dépositaire central des titres Marocain) ainsi que les associations professionnelles (AFSP et ASFM).



الرباط، 02 أكتوبر 2017

بيان صحفي

"الهيئة المغربية لسوق الرساميل"

تشارك في الدورة الأولى لـ "الأسبوع العالمي للمستثمر World Investor Week" التي تجلب أكثر من 70 هيئة ضابطة، وتؤكد التزامها بالترويج بقرينة العلية للمستثمرين وحمايتهم.




أعلنت "المنظمة الدولية لهيئات الأسواق المالية" (OICV) عن انعقاد الدورة الأولى لـ "الأسبوع العالمي للمستثمر" ما بين 2 و 8 أكتوبر 2017، وسيشارك في هذا الحدث الدولي أكثر من 70 هيئة ضابطة، من مختلف بقاع العالم، من بينهم "الهيئة المغربية لسوق الرساميل".

ودعا منها بأمانة التزينة المالية باعتبارها من مميزات حماية المتكبرين وسلامة الأسواق، لزيد "الهيئة المغربية لسوق الرساميل". عضو "المنظمة الدولية لهيئات الأسواق المالية" منذ 2007، اختارها للكمال في هذه المبادرة.

• Flyers & emailing



JEUDI 5 OCTOBRE 2017 DE 14H30 À 18H00

A l'occasion de la World Investor Week initiée par l'OICV*, l'Autorité Marocaine du Marché des Capitaux et la Faculté des Sciences Juridiques, Economiques et Sociales de Rabat-Agdal (FSJES) organisent une rencontre sous le thème :

"LE MARCHÉ MAROCAIN DES CAPITAUX : FONCTIONNEMENT ET PERSPECTIVES DE DÉVELOPPEMENT"

FACULTÉ DES SCIENCES JURIDIQUES, ÉCONOMIQUES ET SOCIALES (FSJES) - UNIVERSITÉ MOHAMMED V - RABAT

AMPHI 1

PROGRAMME

14H30	Inscription des participants et networking
15H00	M. El Habib EDDAGGAG Doyen à la Faculté des Sciences Juridiques, Economiques et Sociales de Rabat-Agdal M. Mehdi HAYAT Président de l'Autorité Marocaine du Marché des Capitaux
15H20	Pr. Farid EL BACHA Chef du Département Droit Privé à la Faculté des Sciences Juridiques, Economiques et Sociales de Rabat-Agdal
15H25	Le marché des capitaux : nouveau cadre de régulation M. Hicham CHERRADI Directeur des Marchés à l'Autorité Marocaine du Marché des Capitaux
15H45	Rôle et fonctionnement de la Bourse de Casablanca M. Ahmed ARHARBI Directeur des Opérations Marchés à la Bourse de Casablanca
16H05	Rôle et fonctionnement du Dépositaire Central M. Mohamed ELAOUJ Directeur des Opérations à Maroclear
16H25	L'intermédiation boursière au Maroc : état des lieux et perspectives M. Rachid OUTARATTE Président Association Professionnelle des Sociétés de Bourse
16H45	Les OPCVM : outils de gestion de l'épargne M. Riadh HILALI Vice Président de l'Association des Sociétés de Gestion et Fonds d'Investissement Marocains
17H05	Débat
17H40	Recommandations et conclusions M. Hicham ELALAIMY Directeur du Pôle Support et Développement à l'Autorité Marocaine du Marché des Capitaux Pr. Saïd TOUNSI Professeur à la Faculté des Sciences Juridiques, Economiques et Sociales de Rabat-Agdal
18H00	Closure de l'événement



JEUDI 5 OCTOBRE 2017 DE 14H30 À 18H00

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JEUDI 5 OCTOBRE 2017 DE 14H30 À 18H00 AMPH1 - FSJES RABAT AGDAL

EN PARTENARIAT AVEC

Université Mohammed V de Rabat
Faculté des Sciences Juridiques, Economiques et Sociales
Agdal

الجامعة المغربية
الهيئة المغربية لسوق الرساميل
الجمعية المغربية للمؤسسات المالية
الجمعية المغربية للمؤسسات المالية
الجمعية المغربية للمؤسسات المالية



JEUDI 5 OCTOBRE 2017 - DE 14H30 À 18H00

UNIVERSITE MOHAMMED V - RABAT

AMPHI 1 - FSJES RABAT AGDAL

PROGRAMME

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18H00	Closure de l'événement

POS advertising



RENCONTRE SOUS LE THÈME :

**“LE MARCHÉ MAROCAIN
DES CAPITAUX :**

FONCTIONNEMENT ET
PERSPECTIVES DE DÉVELOPPEMENT ”

EN PARTENARIAT AVEC

Université Mohammed VI de Rabat
Faculté des Sciences Juridiques
Economiques et Sociales
Agdal

كلية العلوم القانونية
والاقتصادية
والاجتماعية
الاقبال

WORLD
INVESTOR
WEEK 2017

AMC
الهيئة العامة لسوق المال
AMC
أutorité Marocaine du Marché des Capitaux

JEUDI 5 OCTOBRE 2017



UNE RENCONTRE SOUS
LE THÈME :

**“LE MARCHÉ
MAROCAIN DES
CAPITAUX :**

FONCTIONNEMENT
ET PERSPECTIVES DE
DÉVELOPPEMENT ”

JEUDI
5 OCTOBRE 2017
DE 14H30 À 18H00

EN PARTENARIAT AVEC

Université Mohammed VI de Rabat
Faculté des Sciences Juridiques
Economiques et Sociales
Agdal

كلية العلوم القانونية
والاقتصادية
والاجتماعية
الاقبال

WORLD
INVESTOR
WEEK 2017

AMC
الهيئة العامة لسوق المال
AMC
أutorité Marocaine du Marché des Capitaux

PHOTO REPORT







WORLD INVESTOR WEEK 2017

National Coordinator: Financial Markets Authority

The key messages we promoted for World Investor Week were:

A smart investor:

- uses a licensed provider
 - this provides some protection and minimum standards of service
- avoids investing via offshore, online businesses
 - if you do, we can't help if things go wrong
- ignores unsolicited offers
 - it's okay to hang up, or ignore an email.

Referral traffic from social media to our website increased from **1.8%** in 2016 to **8.7%** for the same week in 2017.

Complaints about scams spiked during October as a result of the campaign – 22 in October, compared to an average of 8-10 in other months. One investor specifically mentioned hearing Paul Gregory on Radio Live as a prompt to phone us.

We used the following activities to promote our messages:

Online activities

The World Investor Week logo was added to our home page.

We also published information for investors:

- 'Home truths' article: <https://fma.govt.nz/investors/whats-new/investment-home-truths/>
- Binary options case study: <https://fma.govt.nz/investors/avoid-scams/real-life-scam-stories/#Diana>

Paid media activities

- A tile ad appeared in our two major online news websites – Stuff and the NZ Herald – during the week. It was displayed 534,401 times, resulting in 717 clicks to our 'home truths' web content.
- Two online articles were published by the SpinOff news website. Average read time was over seven minutes across both pieces (much higher than average online NZ media reading time). These articles were also tweeted and shared on the Spinoff's Facebook page.

- <https://thespinoff.co.nz/society/fma/02-10-2017/offshore-scams-and-cold-calling-tricksters-a-guide-to-protecting-your-investment/>
 - 1,717 page views with 15 clicks to our 'home truths' web content. Total reach in social media 36,111 with 78 taking action (liking, sharing or commenting)
- <https://thespinoff.co.nz/society/fma/05-10-2017/power-to-the-people-cutting-through-the-mystery-and-misinformation-of-the-financial-services-industry/>
 - 1,896 page views with 33 clicks to our 'home truths' content. Total reach in social media 37,875 with 144 taking action.

Earned media activities

Sharing a real life case study helped us achieve good media coverage during the week. These articles all made reference to World Investor Week:

FMA warning: Woman loses \$7k in online trading scheme. NZ Herald:

http://www.nzherald.co.nz/business/news/article.cfm?c_id=3&objectid=11928524

Woman lost \$7000 on 'binary options'. Fairfax: <https://www.stuff.co.nz/taranaki-daily-news/business/97451749/World-Investor-Week-warning-Woman-lost-7000-on-binary-options>

FMA urges investors to use a licensed provider. NZ Adviser:

<http://www.nzadviseronline.co.nz/news/fma-urges-investors-to-use-a-licensed-provider-241976.aspx>

FMA warns Kiwis about online scams. NBR: <https://www.nbr.co.nz/article/fma-warns-kiwis-about-online-scams-cs-p-208337>

Paul Gregory, our Director of External Communications and Investor Capability was interviewed by Radio Live: <http://www.radiolive.co.nz/home/audio/2017/10/the-risks-of-investing-with-offshore-providers.html> and Radio New Zealand:

<http://www.radionz.co.nz/national/programmes/ninetoon/audio/201861070/fma-warning-investors-about-dodgy-deals>

He also appeared alongside David Boyle, GM Education at the Commission for Financial Capability in a video for investors: <http://invested.co.nz/>

Social media activities

Each day we published sponsored posts on Facebook and LinkedIn. These linked to our 'Home truths' content: <https://fma.govt.nz/investors/whats-new/investment-home-truths/> or to other relevant content on our website. Examples of the posts include:

- It's World Investor Week and we're urging investors to use a licensed provider
- Investing? Read these 3 simple home-truths from the market watch-dog
- Smart investors use licensed providers. Here's why
- Do you know what to expect when dealing with a financial services provider?
- Smart investors avoid offshore, online investments. Here's why
- It's okay to hang up

Our LinkedIn posts were displayed 41,430 times and resulted in 266 people clicking on the link and 45 people taking action.

Our Facebook sponsored posts were seen by 12,827 people with 87 clicking on the link to our website and 382 taking action (liking, sharing or commenting).

We also ran a tile advertisement on Facebook during the week. This was seen by 97,227 people and resulted in 1,291 clicking on the link to our website and 4,016 taking action.

Stakeholder activities

We emailed 56 stakeholders before World Investor Week explaining what the week was about and asking for support communicating our key messages. 55 stakeholders opted to receive email updates and 19 asked to receive the WIW stakeholder pack.

Two advisers told us they had shared our 'home truths' messages in their client newsletters. One mentioned his clients had also commented on radio coverage during the week.

We are also aware of the below media coverage:

Five easy steps and tactics to foil the scammers. Voxy.co.nz:

<http://www.voxy.co.nz/business/5/294755>

Are you a smart investor? Banking Ombudsman: <https://www.bankomb.org.nz/news-and-publications/media-releases/item/world-investor-week-2017>

Get Sorted: How a man lost \$329k in an investment scam. NZ Herald:

http://www.nzherald.co.nz/personal-finance/news/article.cfm?c_id=12&objectid=11927859

Example images used in communications





WORLD INVESTOR WEEK 2017

National Coordinator: SEC Nigeria

Other IOSCO members:

Other participants:

SEC Nigeria Celebrates World Investor Week 2017

The Securities and Exchange Commission joined the International Organization of Securities Commissions (IOSCO) and other capital market regulators across the globe to celebrate the 2017 edition of the IOSCO World Investor Week, which is the first of its kind from 2nd through 8th October 2017. The Investor Week (WIW) was a week-long, global campaign for IOSCO to raise awareness about the importance of investor education and protection and highlight the various initiatives of securities regulators in these two critical areas.

IOSCO securities regulators across the globe, among others, provided a variety of activities, including launching investor-focused communications and services, promoting contests to increase awareness of investor education initiatives, organizing workshops and conferences, and conducting local/national campaigns in their own jurisdictions. On its part, SEC Nigeria, lined up a series of investor based activities targeted at investors, market women, artisans, students and the general public. Specifically, it set aside time for outreaches to a tertiary institution and a local government headquarters in the Federal Capital Territory on Thursday and Friday, 5th and 6th October respectively. The lined up activities culminated in an interface between regulators, market intermediaries and shareholder groups at a session tagged 'Investor Clinic' which will be held in Lagos to close the 2017 edition of the Week. The Clinic was targeted towards promoting shareholder education, awareness and rights thereby boosting investor protection. The SEC seized the opportunity to share with the stakeholders the 10-year capital market master plan. It was interactive, rich and engaging; in response, the stakeholders lauded the SEC on its efforts in driving capital market development in Nigeria. The SEC intends that the investor clinic programme will become a recurring event, given the platform it presents to investors to meet with regulators for the purposes of charting the way forward for the capital market in Nigeria.

The WIW offers a unique opportunity for IOSCO members to work in collaboration with all investor education and protection stakeholders, at both the local and international levels.



WORLD INVESTOR WEEK 2017

National Coordinator: ONTARIO SECURITIES COMMISSION (OSC)

Other IOSCO members:

Other participants:

The Ontario Securities Commission (OSC) supported and proudly participated in the International Organization of Securities Commissions' (IOSCO) first-ever World Investor Week.

In the province of Ontario, World Investor Week coincided with Investor Education Month activities in October. The OSC leveraged several resources to enhance its participation in this IOSCO-sponsored initiative. Investor awareness, education and outreach were primarily achieved by focusing on digital channels and in-person investor seminars through the OSC in the Community program. World Investor Week key messages were integrated into the OSC Investor Office's social media plans and linked to relevant OSC resources such as GetSmarterAboutMoney.ca in addition to the key messages on the World Investor Week website.

The OSC's World Investor Week activities are summarized as follows:

(i) News Release to mark World Investor Week and Investor Education Month

The OSC issued a news release highlighting the activities for World Investor Week and Investor Education Month in October.

(ii) Investor News Newsletter

The OSC newsletter Investor News is published periodically and informs investors about the latest investor initiatives, educational resources, topical issues, key dates and investor warnings and alerts. It is read by thousands of investors and distributed by email as well as through social media and the OSC's award-winning investor education website, GetSmarterAboutMoney.ca.

World Investor Week was highlighted in the October 3, 2017 issue. Resources and links to the Week's activities were provided as well as an explanation of the importance of the IOSCO-sponsored initiative.

(iii) Tips to Be a Smart Investor webpage on GetSmarterAboutMoney.ca

A new webpage, Tips to Be a Smart Investor, was created for the OSC's award-winning investor education website, GetSmarterAboutMoney.ca. It outlined tips and resources on how to be a "smart investor", aligning with IOSCO's World Investor Week key messages.

(iv) OSC in the Community

The OSC hosted several events as part of its OSC in the Community investor seminars during World Investor Week and Investor Education Month in October. OSC in the Community is an investor outreach program that takes the OSC's important regulatory mandate from Bay Street to Main Street. OSC staff visit communities across the province and present tips on how to better protect yourself against investment fraud in addition to learning how to find unbiased information about investing. OSC staff also highlighted the World Investor Week initiative and its key messages during the presentations.

(v) Social Media

The OSC engaged investors through social media using Facebook (@GetSmarterAboutMoney) and Twitter (@smarter_money). The hashtag #WIW2017 was used to encourage conversation and raise awareness.

A comprehensive content calendar was developed to maximize investor engagement as well as highlight useful educational recourses. For each day of World Investor Week, the OSC tweeted and posted investor education and protection messages through its social media channels, aligning with the IOSCO's "smart investor" key messages. Rich media assets were also developed to further enhance engagement.

New animations were created to highlight the importance of checking advisor and business registration aligned with one of the World Investor Week key messages. The animations used simple language and colors to engage investors and share the key message of checking registration.

Attachments

Figure 1

OSC staff speaking to investors about World Investor Week key messages including checking registration, common types of investment fraud, how to work with a financial advisor and where to find unbiased financial information



Figure 2

Selection of social media posts



Figure 2 (continued)

Selection of social media posts



GetSmarter AboutMoney.ca
Published by Hootsuite [?] · 6 October ·

Use our Compound Interest calculator to find out how much will your #money grow over time. <http://ow.ly/aT1w30IFRKz> #WIW2017

Compound Interest Calculator



Start!

OSC ONTARIO SECURITIES COMMISSION Get Smarter About Money.ca

GetSmarter AboutMoney.ca
Published by Hootsuite [?] · 8 October ·

Here are 4 signs of investment fraud you should know about. <http://ow.ly/w96f30fHmBo> #WIW2017

OSC ONTARIO SECURITIES COMMISSION Get Smarter About Money.ca

4 signs of investment fraud

Look out for these signs, research any potential investment that you're offered and check registration status before you invest.

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WORLD INVESTOR WEEK 2017

National Coordinator: Securities and Exchange Commission of Pakistan

Other participants: Central Depository Company

Securities & Exchange Commission of Pakistan (SECP) being an IOSCO member actively participated in the World Investor Week (WIW) campaign to provide a wide variety of activities. These activities include launching of social media publications, promoting stock trading contests, organizing events such as educational workshops and conferences at private/public universities and conducting local/national campaigns for entities to escalate financial education in the country.

An overview of these activities is as follows:

1. Launch of 1st Inter-University Stock Trading Competition

Oct 2nd, 2017: As its regular feature, the Securities and Exchange Commission of Pakistan (SECP) conducted its 1st stock trading competition for the finance and management students across the country. The event was launched in collaboration with the Higher Education Commission (HEC) to enhance financial awareness amongst students.

2. Launch of "Approach JamaPunji"

On Oct 2nd, 2017 "Approach JamaPunji" program was launched which is a two-way mode of communication between SECP and the general public. The purpose of this broad-spectrum initiative is to help the masses connect with JamaPunji team in order to arrange investor awareness seminars for them.

3. Social Media Campaign

IOSCO key messages were run throughout the week. Total visits during the week are as follows:

- **Facebook:** More than **18,021 likes generated and more than 122,135 people reached** to date through 21 posts made during the World Investor Week 2017 on JamaPunji **Facebook** Official Page (www.facebook.com/jamapunji.pk)
- **Twitter:** More than **219 likes and 44 retweets** generated to date on 19 posts made during the World Investor Week 2017 on JamaPunji **Twitter** Official Page (www.twitter.com/jampunji_pk)
- **8181 subscribers:** More than 11,500 text messages (tip of the day) sent to users of 8181 subscribers during the World Investor Week 2017

4. Distribution of Investor Awareness Material

Oct 2nd-6th, 2017: While observing World Investor Week 2017, IEIRD dispatched investor awareness material in the form of guide booklet and flyers to be placed in university's resource center. More than **3000** guide booklets and flyers were distributed and dispatched to:

- **47** HEC recognized universities and accounting bodies
- Pakistan Television (PTV)
- Pakistan Civil Aviation (CAA)
- Rawalpindi Chambers of Commerce & Industry (RCCI)

5. Investor Awareness Session in collaboration with ACCA

The Securities and Exchange Commission of Pakistan (SECP) conducted an investor awareness session in collaboration with the Association of Chartered Certified Accountants (ACCA). The speaker discussed the importance of money management and elaborated investment avenues for them.

6. Investor Awareness Seminar at Pakistan television (PTV), Pakistan Civil Aviation Authority (CAA) and Air University

The objective of the seminar was to create awareness among the audience about the areas being regulated by the SECP and the product suite available to investors for making legitimate and safer investment decisions.

7. Investor Awareness Webinar at ACCA

The webinar focused on various rules for investment, variety of financial products and financial habits that are prolific and productive for long-term investments.

8. Panel discussions at Rawalpindi Chamber of Commerce & Industry (RCCI) and National University of Modern Languages (NUML)

The panel discussions focused on the need for financial literacy in emerging markets and investor awareness about various investment products available in Pakistan. The SECP's awareness material was also distributed among the participants for their future assistance.





WORLD INVESTOR WEEK 2017

National Coordinator: Dr. Bashar AbuZarour.

IOSCO member: Palestine Capital Market Authority.

Other participating organizations in Palestine:

- Ministry of Education
- Palestine Stock Exchange.
- United Securities Company.
- Target Jordan Palestine Securities.
- National Company for Securities Investment.
- Global Securities Company.
- Sahem Trading & Investment Company.
- Lotus Financial Investment.
- AlWasata Securities.
- Al Arabi Investment Group.

Palestine Capital Market Authority have participated and supported IOSCO in its efforts by conducting several activities and events during the World Investor Week that took place between 2 and 8 October, 2017. PCMA have encouraged other institutions in Palestine to participate in IOSCO's WIW. As a result, Palestine stock exchange and 8 brokerage companies participated in the IOSCO's WIW activities.

These activities have targeted different categories from the society as a whole, specifically dealers in the securities sector and students from universities and schools. Such activities included creating a portal for the investor week on PCMA official website containing different awareness materials related to securities, holding several awareness meeting with investors from securities sector, and holding an open day in two local universities in celebration of the investor's week in coordination with the Ministry of Education. In addition, PCMA hosted different schools' delegation at PCMA and other participating institutions.

Several evaluation tools have been used to measure the effectiveness and impact of these events on the targeted audiences. Results turned out to be fruitful. Below, is a list of all conducted activities/events and evaluation tools used to measure the engagement level:

- **Create a portal for the World Investor Week on PCMA official website.** The number of clicks on the portal reached 2,353. The WIW logo as an icon was placed on PCMA official website and Stok Exchange website as well as on the websites of the participating brokerage companies; the logo was linked to the established portal on PCMA website for WIW. Moreover, the portal contained a variety of icons including awareness messages, frequently asked questions, publications, caricatures, radio advertisements, media coverage materials, the participating parties and events schedule. Please follow the link: <http://www.pcma.ps/SitePages/WIW2017.aspx>
- **The number of news** related to the WIW events reached 8, the news included 2 from the PCMA, and the other 6 were news from participating institutions regarding their participation and activities in the event. These were published in newspapers, news agencies, through mailing lists and official websites of securities companies, Palestine Stock Exchange & participating universities.
- **An open day have been held in two local universities in celebration of the Investor week.** The participating universities were Palestine Technical University-Kadoorei and Palestine Ahliya University. It took place in October 2nd and October 4th respectively. On the one hand, the number of students attending the workshop at PTU reached 270, and about 45 teachers attended the workshop. 200 materials (brochures that revolved around securities sector) were distributed. The workshop included 4 activities, in which 6 students participated in those activities. The number of student who interacted with asking questions was 4. The percentage of female students attending the workshop was 75%. On the other hand, the number of students attending the workshop at PAU reached 160, and about 6 teachers attended the workshop. 200 materials were distributed. The workshop included 4 activities, in which 6 students participated in those activities. The number of students asking questions was 7. The percentage of female students attending the workshop was 70%.
- **Palestine Stock Exchange developed an educational CD.** The number of CDs prepared and distributed to school students containing information about the securities sector reached 1,400.

- During the WIW event, PCMA continued the efforts in **merging a special course in corporate governance in the Palestinian universities.**
- **Launching corporate governance competition** with concerned universities in the event of WIW, this competition targeted 350 student.
- **Several school delegations were received in PCMA, Palestine stock exchange and securities companies participating in the WIW event.** These visits targeted school students and aimed to increase financial awareness among them about the securities sector in Palestine. A total of 350 student participated in the school visits. In addition, the degree of interaction and engagement among students was high. The percentage of female student participation was high at 65%. Financial awareness materials were distributed to the students during these visits.







WORLD INVESTOR WEEK 2017

National Coordinator:

Other IOSCO members:

Other participants:

La Superintendencia del Mercado de Valores de Panamá (SMV), se unió la Campaña mundial que llevó adelante la Organización Internacional de Comisiones de Valores (IOSCO, por sus siglas en inglés), la cual fue lanzada para crear conciencia sobre la importancia de la educación al inversionista.

Con esta Campaña Mundial, IOSCO y todos los países que se sumaron a esta iniciativa, contribuyeron a incrementar el conocimiento sobre cómo prevenir fraudes y Compartir información relacionada al mercado de valores.

La SMV es miembro de IOSCO y cumple con todos los estándares exigidos por esta organización a nivel internacional. #educandoalinversionista www.supervalores.gob.pa

CUADRO SEMANAL DE ACTIVIDADES EJECUTADAS:

02 de Octubre -Lunes -	03 de Octubre -Martes-	04 de Octubre -Miércoles-	05 de Octubre -Jueves-	06 de Octubre -Viernes-
<i>Diseño y Publicación de Anuncio en Página Web SMV.</i>	<i>Publicación de Anuncio en Página Web SMV.</i>	<i>Publicación de Anuncio en Página Web SMV.</i>	<i>Publicación de Anuncio en Página Web SMV.</i>	<i>Publicación de Anuncio en Página Web SMV.</i>
	<i>*Entrega Oficial de ejemplares de los Libros del Cuento Ganador AIOS - SMV Panamá en Escuela José Agustín Arango de Betania.</i>		<i>*Conversatorio SMV & Cámara de Comercio, Industrias y Agricultura de Panamá.</i>	<i>*Taller de Actualización del Mercado de Valores. Alianza SMV & Órgano Judicial.</i>
Mensaje Mundial en Redes Sociales- Twitter.	Mensaje Mundial en Redes Sociales- Twitter.	Mensaje Mundial en Twitter.	Mensaje Mundial en Redes Sociales- Twitter.	Mensaje Mundial en Redes Sociales- Twitter.

IMPACTO ACADÉMICO:

03 de Octubre

Entrega Oficial de ejemplares de los Libros del Cuento Ganador AIOS- SMV Panamá en la Escuela José Agustín Arango de Betania.



IMPACTO EMPRESARIAL:

05 de Octubre

Encuentro Empresarial SMV & Cámara de Comercio, Industrias y Agricultura de Panamá (CCIAP)-2017



IMPACTO GUBERNAMENTAL:

06 de Octubre

Seminario Taller de Actualización del Mercado de Valores SMV & Órgano

Judicial-2017





WORLD INVESTOR WEEK 2017

National Coordinators: Marcelo Echague Pastore; Luis Talavera Insfrán

The Comisión Nacional de Valores of Paraguay (CNV) participated at the World Investor Week (WIW) 2017 by organizing three open public talks during the evening that lasted approximately three hours each. Several stakeholders stemming from the stock market industry were invited as lecturers, including market intermediaries, credit rating agencies, the stock exchange itself, and so forth. Every stakeholder hence explained about its goals, functions and operations in the stock market, while also highlighting important information related to investor education and protection within their own fields of expertise.

The first talk took place on October 3 at the National University of Asuncion (UNA), widely considered as the largest tertiary education institution in the country. It hosted more than 280 participants, mostly university students from the Economics and Business School. Five lectures took place that day, with professionals discussing about regulation, investments at the stock market, role and functions of market intermediaries, trust funds, and the understanding of credit rating reports and scores.

The second talk took place on October 4 at the National Chamber of Commerce and Services of Paraguay (CNCSP). It hosted about 50 participants, mostly people coming from the private sector and civil society. Five lectures took place that day as well, covering the same topics but with different experts offering the talks, with one of them traveling exclusively to Paraguay for such event.

The third and last series of talks took place on October 5 at the Autonomous University of Encarnacion (UNAE), as an attempt to decentralize the WIW 2017. It hosted more than 270 participants, mostly university students from UNAE and other universities around the city. Six lectures took place that day as well, covering again the same topics but changing lecturers, who kindly offered themselves to travel to Encarnacion for the event.

It is important to mention that all attendees have received a certificate for their participation during the WIW, as well as leaflets, flyers and CD-Roms containing relevant information on investors protection/education as well as the stock market's functioning. Finally, presentations displayed in the abovementioned events are public and currently available at the CNV's website.



WORLD INVESTOR WEEK 2017

National Coordinator: Superintendencia del Mercado de Valores (SMV)

Other IOSCO members:

Other participants:

La Superintendencia del Mercado de Valores (SMV) de Perú participó de la primera Semana Mundial del Inversionista 2017 (World Investor Week), en el marco de la campaña global promovida por IOSCO, reconociendo con ello la importancia de la educación al inversionista como un mecanismo para el desarrollo y la promoción de los mercados de valores, dado el impacto directo y positivo que esta tiene sobre su desarrollo en el mediano y largo plazo.

De esta forma, la SMV llevó a cabo diversas actividades con la finalidad de concientizar a los inversionistas y al público en general acerca de la relevancia de la educación y protección de los inversionistas. En esa línea, la SMV implementó en la Sección de Orientación del Portal del Mercado de Valores (www.smv.gob.pe), un acápite especial de la Semana Mundial del Inversionista, donde se describieron las principales actividades y mensajes de la campaña.



Fuente: Sección Semana Mundial del Inversionista en el Portal del Mercado de Valores.

Así, la SMV persiguió poner especial énfasis en comunicar la importancia que los inversionistas se informen adecuadamente sobre las distintas alternativas de inversión en el mercado de valores y de los beneficios, costos y riesgos asociadas con estas; la necesidad de que estos se cercioren que la entidad a través de la cual realizan sus inversiones en el mercado de valores se encuentre debidamente autorizada por la SMV; el considerar criterios de diversificación al momento de invertir; el ser prudente ante los consejos o recomendaciones de terceros; así como la relevancia de realizar un seguimiento permanente sobre el estado de las inversiones realizadas.



Fuente: Sección Semana Mundial del Inversionista en el Portal del Mercado de Valores.

Conferencias y Jornadas Públicas

Se realizaron dos conferencias públicas con la participación como ponentes de funcionarios de la SMV. Dichos eventos se organizaron para diferentes segmentos de público, con la finalidad de presentar y focalizar los temas de interés más adecuados a las necesidades del público objetivo. De esta forma se llevaron a cabo:

- **Seminario al público en general: “Alternativas de Inversión en el Mercado de Valores”**

Seminario dirigido al público en general, realizado el 3 de octubre y que contó con la asistencia de alrededor de 160 personas. Se expusieron temas relacionados con el rol de la SMV y la protección del inversionista; Alternativas de Inversión en el mercado bursátil; y Fondos Mutuos como alternativa de inversión.



- **II Jornada de Orientación para el Adulto Mayor**

El 6 de octubre se realizó la II Jornada de Orientación al Adulto Mayor, con la finalidad de presentar a dicho segmento de público las alternativas de inversión disponibles en el mercado de valores, de acuerdo a su perfil, así como también los medios y canales de información y consulta disponibles. De esta forma, dos funcionarios de la SMV presentaron temas relacionados con el rol de la SMV y la protección del inversionista; y las alternativas de inversión en el mercado de valores. Se contó con la participación de alrededor de 40 adultos mayores.



Campañas de difusión a través de medios de comunicación (escrito y radial)

Se difundieron diversos mensajes que las personas deben tomar en cuenta al momento de invertir en el mercado de valores, los cuales fueron publicados en dos diarios de circulación nacional, además de notas de prensa que fueron difundidas a través del Portal del Mercado de Valores.



De igual forma, se realizó la difusión de dos mensajes de la campaña a través de una radio con alcance a nivel nacional, cada uno de los cuales tuvo una duración de 15 segundos y fueron transmitidos 5 veces por día durante la semana del 02 al 06 de octubre de 2017.

Dichos spots tuvieron los siguientes mensajes (alineados con la campaña):

- *Infórmese adecuadamente sobre las distintas alternativas de inversión en el mercado de valores y de los beneficios, costos y riesgos asociadas con estas. Semana Mundial del Inversionista - Superintendencia del Mercado de Valores: www.smv.gob.pe.*
- *Infórmese adecuadamente antes de invertir y cerciñose que la entidad a través de la cual realiza sus inversiones en el mercado de valores esté autorizada por la Superintendencia del Mercado de Valores. Semana Mundial del Inversionista: www.smv.gob.pe.*

Difusión de mensajes de la campaña vía redes sociales de la SMV

Asimismo, se transmitieron mensajes de la campaña a través de las redes sociales (Facebook, Twitter) de la SMV, permitiendo ampliar el alcance de dichos mensajes:



Otras iniciativas

Entre otras actividades realizadas durante la Semana Mundial del Inversionista 2017, estuvieron el lanzamiento del Blog de la SMV en el web del principal diario financiero del país, en el cual la SMV tiene presencia permanente difundiendo aspectos relativos al mercado de valores.



Fuente: Blog de la SMV en la web del Diario Gestión (www.gestion.com.pe)

Principales resultados alcanzados

Iniciativas como la Semana Mundial del Inversionista se enmarcan dentro de las políticas y objetivos institucionales de la SMV, considerando que los reguladores debemos desempeñar un papel activo en la educación de los inversionistas y de otros participantes en los mercados, para mejorar su comprensión sobre el rol que cumple el supervisor y proporcionar a los inversionistas las herramientas necesarias para evaluar los riesgos asociados a determinadas inversiones y para protegerse del fraude y de otros abusos, así como contar con la capacidad de reclamar sus derechos en caso consideren que han sido afectados, constituyéndose así en el fiscalizador de primera línea de su inversión.

Así, Semana Mundial del Inversionista 2017, ha permitido reforzar la difusión de mensajes y alertas al público en general acerca de aspectos claves a tener en cuenta para participar en el mercado de valores, valiéndonos de diversas herramientas tecnológicas, escritas y presenciales para obtener el mayor alcance posible. De esta forma, estimamos que mediante las publicaciones escritas se logró tener un alcance aproximada de 200,000 personas; con los anuncios radiales estimamos un alcance aproximado de 300,000 personas, mientras que a través de las redes sociales se estima que al menos 26,000 personas han podido observar los diversos mensajes de la campaña.

WORLD INVESTOR WEEK 2017 POLAND

National Coordinator: Polish Financial Supervision Authority (KNF)

Other IOSCO members:

Other participants: Education Development Centre (ORE)

Polish Financial Supervision Authority (KNF) organized a workshop dedicated to teachers involved in financial literacy especially those of economics and vocational subjects. The workshop titled „Investing on financial market – how does it work” was conducted by the KNF's staff. The initiative was promoted among school society by Education Development Centre. The workshop was focused on the following issues: mechanisms of financial market's functioning, different kinds of investments in the financial market and related risks, rules of safe investments. All participants were provided with a class scenario referring to the workshop's topic, printed and electronic workshop materials and KNF's publications as well.

Date: 6th October in 2017

Place: the KNF's office, Pl. Powstańców Warszawy 1, Warsaw, Poland

Number of participants: 28

https://www.knf.gov.pl/dla_rynku/edukacja_cedur/konkursy/WIW_2017?articleId=58668&p_id=18

<https://www.ore.edu.pl/7776-warsztaty-dla-nauczycieli-„inwestowanie-na-rynku-finansowym---jak-to-dziala”>



WORLD INVESTOR WEEK 2017

National Coordinator: CMVM

Other IOSCO members:

Other participants: Lisbon Town Hall, Gouveia Town Hall, Grândola Town Hall, Pombal Town Hall.

Partners: Euronext Lisbon, APB (the Portuguese Banking Association), APS (the Portuguese Insurance Association), APIFPP (the Investment Funds and Pensions Association), AEM (the Listed Companies Association) and APAF (Portuguese Association of Financial Analysts)

Number of people reached directly: 256

Number of people reached indirectly (website): 12.120

CMVM's participation in the World Investor Week (WIW) was conducted together with relevant stakeholders in the Portuguese financial market: Euronext Lisbon, APB (the Portuguese Banking Association), APS (the Portuguese Insurance Association), APIFPP (the Investment and Pension Funds Association), APAF (Portuguese Association of Financial Analysts) and AEM (the Listed Companies Association). Furthermore, university professors from Nova school of Business and Economics and Instituto Superior Técnico collaborated on WIW with relevant participation on the promoted workshops. This collaboration enriched the experience and maximized the dissemination of key messages to investors. The WIW also benefited from the participation of local communities in collaboration with different Town Halls (Lisbon, Gouveia, Grândola and Pombal).

CMVM's approach during the WIW was to target both retail and professional investors in order to increase the awareness of investor education and protection in Portugal from a broad investor base.

On October 2nd CMVM's library was open for the general public on an extended schedule and a selection of publications on financial education and investor protection were made available together with videos and quizzes promoting the dialogue and the engagement with the public from an educational perspective.

On October 3rd, 5th and 6th, CMVM promoted informative local campaigns throughout the country in different cities in the North, Centre and South regions. Mobile libraries equipped with educational materials took place in Lisbon, Gouveia, Grândola and Pombal (136 people participated). On October 6th, CMVM held an open class for 15 senior citizens at a university for seniors disseminating key messages and promoting awareness on investor protection topics.

On October 4th, CMVM hosted a conference on Financial Innovation and Capital Markets Development directed to professional investors (104 people attended). Two workshops on Fintech topics: robo-advice and blockchain, and a debate on Capital Markets Programs were held with the objective of promoting an open dialogue with

different stakeholders (entrepreneurs, regulators, investors, universities and the main financial market associations). An award competition promoting research on financial innovation was launched in the same event.

Both CMVM and its partners displayed new information tools targeted to retail investors, namely key messages for investors, FAQ's and brochures covering investor protection issues online and a dedicated investor hotline was open for investors until 8 p.m.



WORLD INVESTOR WEEK 2017, QUEBEC (CANADA)

National Coordinator : Camille Beaudoin

Other participants:

In August 2017, the AMF Quebec promoted the World Investor Week (WIW) among Canadian Securities Administrators (CSA) members and invited them to join WIW Celebrations on social media. The AMF Quebec also followed up with IIROC and stakeholders in Quebec.

8th Financial Education Day & Quebec Financial Education Strategy

On September 29, the AMF Quebec launched the WIW during its 8th Financial Education Day ([see Press Release](#)) held in Montreal with the presence of the honorable Quebec Minister of Education who introduced a mandatory course of Financial Education in the curriculum for grade 12 (September 2017). A group 75 Financial Education Experts gathered at this annual event linked to the [Quebec Financial Education Strategy](#). The AMF Quebec also awarded the 2nd AMFQ Prize for Concertation/Collaboration in Financial Education.

Youth, teachers and the *Talking money in class!* Contest

Part of the ambitious project to contribute to a cultural shift about money in Quebec, the AMF Quebec launched the 2nd edition of the [Talking money in class!](#) contest addressed to teachers (primary, high school, college and adults levels). This contest is linked to the Quebec Financial Education Strategy and also aims to promote AMF Stakeholders' tools offered to teachers, parents and youth. Participants may win on of the 21 cash prizes.

New Investor Risk Profile Calculator

The AMF Quebec launched an experimental Investor Risk Profile Calculator during WIW. This calculator aims to educate users while referring them to educational tools and making them aware of any inconsistencies in their answers. [An initial version is actually available for testing.](#)

More protection for consumers/investors in Quebec with Bill 141

The Government of Quebec and Minister of Finance presented Bill 141 at the Assemblée Nationale (Parliament of Quebec) on October 5. [Bill 141 is an Act mainly to improve the regulation of the financial sector, the protection of deposits of money and the operation of financial institutions.](#)

Seniors

The AMF Quebec participated at the FADOQ Seniors Fare and met with more than 15 000 seniors during the first weekend of the WIW. On October 3rd, the AMF Quebec also outreach with seniors for a conference on its assistance services and fraud prevention (85 seniors attended).

Canadian Securities Administrators (CSA) Investor Index

The launch of the [CSA Investor Index 2017](#) was originally scheduled for WIW. Unfortunately, due to technical problem with the sampling, it has been postponed later in October which is Investor Education Month in Canada.





WORLD INVESTOR WEEK 2017

National Coordinator: The Financial Supervisory Authority

Other IOSCO members: -

Other participants: Union of Bilateral Chamber of Commerce in Romania (UCCBR), the Bucharest Stock Exchange (BVB) and the Central Depository

Financial education is the foundation for a good understanding of the concepts that the adult faces in his life. The educational level is important for the good functioning of the economy as a whole. Only a population that knows how to manage their incomes and how to achieve savings helps maintain a general financial equilibrium. Financial capability, as a result of financial education, is a determinant of economic growth and population welfare. The low level of non-banking financial knowledge has led over time to keeping markets at a sub-developed level, helped only by state intervention (stock market privatization, insurance obligations or private pension obligation), and increasing the degree of public mistrust that produces instability, low liquidity and lack of responsiveness.

Under the aegis of the Investor's Day, the Financial Supervisory Authority (ASF) has supported World Investor Week 2017, as a member of IOSCO's Committee on Retail Investors (C8), and has organized a series of activities aimed at raising the awareness of the population about the importance of financial education and the involvement of children and young people in it, as follows:

Opening of the Bucharest Stock Exchange (BVB) on October 2, 2017 with a group of 53 high-school students from a school that is part of the ASF financial education program. In the first part of the meeting, representatives of ASF and BVB gave a presentation on the main role of the capital market and the stock market. Next, a finance university professor held a game exercise, that in the end encountered success in the participants. During the event, the participating students received packages with diplomas, the guide *threefold - 18 years - I am financially responsible*, piggy-banks and bracelets. The event took place in the Millennium Hall of the Bucharest Stock Exchange Building. The event was promoted on ASF and BVB webpages.

On the same day (October 2, 2017), starting at 13:00, the financial education pilot program for the 2017-2018 school year was launched at one Economic College in Bucharest, a school that became part of the ASF financial education program, for the 11th grade students (approximately 240) and their teachers. During this event, the ASF representatives presented the Pilot Project - a broad non-banking financial education program as well as general elements on the definition of the three markets supervised by the ASF. The focus point was on risk management and investments. The event was promoted on Facebook, having an organic impact of 1.100 persons.

On October 3, 2017, took place *The Investment Opportunities Conference on the Capital Market in Romania*, held by ASF, the Union of Bilateral Chamber of Commerce in Romania (UCCBR), the Bucharest Stock Exchange (BVB) and the Central Depository. The Conference approached topics related to investments, investors, basics, legislation, opportunities. At the conference were invited actual and potential investors, representatives of the business environment as well as representatives of the capital market and financial media. The main objective of this initiative was to increase the level of investment finance education on the capital market, to improve the understanding of concepts, notions, financial mechanisms in order to reduce financial exclusion and improve the future level of economic well-being. ASF has distributed within the Conference educational material specific to the topics covered, such as: The ASF Collection - Capital Market Guidelines. At this event, 170 people were registered.

The event has been promoted on ASF's official Facebook page on 23, 25 and 29 September under the WIW logo. On October 2, a press release has been sent to the media announcing the "International Investor Week" conference. It has been also promoted on the official ASF Facebook page. The Facebook impact was over 28.500 persons.

To mark the World Investors Week event on October 4, 2017, the Central Depository issued free of charge account excerpts for financial instrument holders present at the headquarters of the institution, with the opportunity to find out where they are shareholders. It has been issued 161 free of charge account excerpts. In this regard, The Financial Supervisory Authority has developed the flyer *Are you a shareholder? Be informed!* containing important information about the rights and obligations of the shareholder. This has been handed over by the Central Depository's representatives to all account statement applicants. The action was promoted on Facebook, with an impact of over 29.000 persons. The week also was marked by the public distribution of the flyer, within a quantity of 50.000 pieces.

At the same time, part of the activities of the ASF within the World Investor Week (WIW), the Financial Supervisory Authority organized for primary school pupils from a school in Bucharest a presentation of investments and money (money, investment, savings, personal budget), teaching financial concepts presented in an age-appropriate form. The presentation ended with a contest, in which children made an essay, draw or build something connected to investors.

As part of the celebrations of WIW 2017, ASF build a special webpage for the event (<http://asfromania.ro/edu/wiw/>). On this web section we presented with pictures and data all the events.

From a media point of view, these events organized by the ASF were well received, appreciated, being taken over both online and radio-TV. Below are the main links that refer to WIW's ASF actions, as follows:

Monitoring report 3.10.2017

<http://www.amosnews.ro/saptamana-internationala-investitorului-2017-10-02>
<http://www.curierulnational.ro/Piata%20bursiera/2017-10-02/Saptamana+Internationala+a+Investitorului>
<http://www.1asig.ro/Saptamana-Internationala-a-Investitorului-articol-3,100-57185.htm>
<http://www.finzoom.ro/articole/comunicat-presa/saptamana-internatio~801fad2-50c4-4acd-a00c-7983e74cba72/>
<http://www.xprimm.md/Saptamana-Internationala-a-Investitorului-articol-2,3,100-57185.htm>

Monitoring report 4.10.2017

<https://www.agerpres.ro/economie/2017/10/03/anghel-bvb-romanii-nu-ocupa-un-loc-fruntas-din-punct-de-vedere-al-educatiei-financiare-11-09-53>
<https://www.agerpres.ro/comunicate/2017/10/03/comunicat-de-presa-depozitarul-central-19-51-54>
<http://www.ziuanews.ro/revista-presei/anghel-bvb-romanii-nu-ocupa-un-loc-frunta-din-punct-de-vedere-al-educa-iei-financiare-794007>
http://www.economica.net/depozitarul-central-elibereaza-gratuit-miercuri-extrase-de-cont-detinatorilor-de-instrumente-financiare_144235.html
<https://evenimente.juridice.ro/2017/10/saptamana-internationala-a-investitorului-2-8-octombrie-2017-bucuresti.html>
<http://www.financialmarket.ro/investitii/piata-de-capital/world-investor-week/>
<https://www.investingromania.com/ro/stiri/stiri-agerpres/anghel-bvb-rom-nii-nu-ocup-un-loc-frunta-din-punct-de-vedere-al-educa-iei-financiare>
<https://www.investingromania.com/ro/stiri/stiri-agerpres/depozitarul-central-elibereaz-gratuit-miercuri-extrase-de-cont-de-in-torilor-de-instrumente-financiare>
http://www.banknews.ro/stire/80829_anghel_bvb_romanii_nu_ocupa_un_loc_fruntas_din_punct_de_vedere_al_educatiei_financi_are.html
<http://www.manager.ro/articole/financiar-bancar-94/ce-puteti-face-in-saptamana-internationala-a-investitorului-91997.html>
<http://www.bankingnews.ro/educatie-financiara-bvb-lucian-anghel.html>
<https://www.agerpres.ro/economie/2017/10/03/ursache-piata-de-capital-trebuie-sa-suplineasca-lipsa-apetitului-investitional-al-sistemului-bancar-10-27-03>
<http://www.bizlawyer.ro/stiri/interviuri-opinii/ursache-piata-de-capital-trebuie-sa-suplineasca-lipsa-apetitului-investitional-al-sistemului-bancar>
<https://www.investingromania.com/ro/stiri/stiri-agerpres/tirile-amiezii-economic-3-octombrie>
<https://www.investingromania.com/ro/stiri/stiri-agerpres/ursache-pia-a-de-capital-trebuie-s-suplineasc-lipsa-apetitului-investi-ional-al-sistemului-bancar>
http://www.banknews.ro/stire/80832_ursache_piata_de_capital_trebuie_sa_suplineasca_lipsa_apetitului_investitional_al_sistemul_ui_bancar.html
http://www.stiripesurse.ro/ursache-pia-a-de-capital-trebuie-sa-suplineasca-lipsa-apetitului-investi-ional-al-sistemului-bancar_1222823.html
<http://www.eazi.ro/bani-afaceri/bursa-poate-suplini-sistemul-bancar>
http://www.radiointact.ro/ursache-piata-de-capital-trebuie-sa-suplineasca-lipsa-apetitului-investitional-al-sistemului-bancar_840184.xhtml
http://www.romaniatv.net/mircea-ursache-asf-mediul-investitional-romanesc-asteapta-fondul-suveran-dar-acesta-ar-trebui-listat-in-viitor_379437.html
http://www.romania-actualitati.ro/investitorii_asteapta_fondul_suveran_de_dezvoltare_si_investitii-107855
<http://www.bizlawyer.ro/stiri/interviuri-opinii/ursache-asf-mediul-investitional-romanesc-asteapta-fondul-suveran-dar-acesta-ar-trebui-listat-in-viitor>
<http://www.sursazilei.ro/ursache-asf-mediul-investitional-asteapta-fondul-suveran-dar-acesta-ar-trebui-listat-viitor/>
<http://gazeta-afacerilor.ro/raport-monitorizare-a-presei-3-octombrie-2017-ora-1300/>

Monitoring report 5.10.2017

<http://www.finzoom.ro/articole/sfaturi/educatia-financiara-~868ebb76-b065-4086-9379-007bd11d83c5/>
<http://www.e-politic.ro/stiri/romanii-pot-afla-gratis-miercuri-de-la-depozitarul-central-ce-detineri-au-pe-piata-de-capital-743567>
<http://www.curierulnational.ro/Economie/2017-10-04/Depozitarul+Central+va+elibera+gratuit+extrase+de+cont>
<http://www.ziuanews.ro/stiri/rom-nii-pot-afla-gratis-miercuri-de-la-depozitarul-central-ce-de-ineri-au-pe-pia-a-de-capital-794823>
<http://www.bizlawyer.ro/stiri/tranzactii/depozitarul-central-elibereaza-gratuit-miercuri-extrase-de-cont-detinatorilor-de-instrumente-financiare>
<http://www.romaniatv.net/romanii-pot-afla-gratis-miercuri-de-la-depozitarul-central-ce-detineri-au-pe-piata-de-capital-379622.html>
<http://www.wall-street.ro/articol/Piete-de-capital/214620/depozitarul-central-acorda-extrase-de-cont-gratuite.html>
<http://www.mediafax.ro/economic/romanii-pot-afla-gratis-miercuri-de-la-depozitarul-central-ce-detineri-au-pe-piata-de-capital-16753501>

"We have a lot to do in terms of financial education. We also know very few alternatives and here we have the support and involvement and we enjoyed having had with us investment funds, pensions, brokers, insurers in an attempt to show all the investment financial alternatives for the Romanians who have wanted to participate in these events. If we have a degree of financial education, not only the capital market or the financial market will benefit, but the whole of Romania." Lucian Anghel, President of the Bucharest Stock Exchange.

Opening of the Bucharest Stock Exchange



The Investment Opportunities Conference on the Capital Market in Romania

ASF representatives presenting the Pilot Project - non-banking financial education program



Projects made by the children of grades 1-4





WORLD INVESTOR WEEK 2017

National coordinator: the Bank of Russia

Other participants: the Moscow Exchange, members of the Expert Council on Financial Literacy under the Bank of Russia and financial market players

Russian World Investor Week was a pilot project under the auspices of the Bank of Russia and the Moscow Exchange.

WIW hosted the following events.

1. On the first day of WIW, 2 October 2017, the Bank of Russia posted a [WIW press release](#) prepared by the Service for Consumer Protection and Financial Inclusion (the Service) and [a welcoming video address](#) by Sergey Shvetsov, First Deputy Governor of the Bank of Russia.
2. During the week, the Bank of Russia posted short promotional messages recommended by IOSCO on a special [WIW webpage](#) and on the Bank of Russia's [Facebook page](#) on a daily basis. The above WIW webpage also featured the Service's comments on the short messages with hyperlinks to the Bank of Russia's financial literacy website ([fincult.info](#)).

The list of messages:

Day one, 2 October.

Smart investor conducts research on a product before investing and finds out the details of an investment product in advance.

Day two, 3 October.

Smart investor assesses the impact of fees when choosing an investment.

Day three, 4 October.

Smart investor assesses their risks and understand that any type of investment is risky; they avoid "get rich quick" and "can't lose" schemes.

Day four, 5 October.

Smart investor realises that profitable investment usually means long-term investment and a diversified portfolio.

Day five, 6 October.

Smart investor knows how to protect their rights.

The posts reached approximately 8,000 Facebook users² who interacted with the posts about 250 times³.

² The number of users that viewed the post.

³ Likes, reposts and clicks on links.

More than 1,700 individual users visited the WIW page on the Bank of Russia website with hit count of 4,000 over the week.

3. A **series of daily online conferences** involving the management of the Bank of Russia and the Moscow Exchange was held for the public from 2 to 5 October 2017. The videos and presentation materials are available on the Bank of Russia's [WIW webpage](#) and [YouTube channel](#). Financial market experts shared their vision of a smart investor, talked to the audience about new little-known investment products in the financial market and the related risks, and answered the public's questions about investing and rights protection.

Each speaker's topic was closely related to the message and the information posted that day on the Bank of Russia website and Facebook account.

Speakers representing the Bank of Russia:

- **Mikhail Mamuta**, Head of the Service for Consumer Protection and Financial Inclusion (the Service); the topic of day one of WIW was the need to be careful when making investment decisions and find out the details of the investment product in advance, and the Russian system of investor protection;
- **Valeriy Lyakh**, Director of the Department for Countering Misconduct; the topic of day two of WIW was fraud in the financial market;
- **Philipp Gabuniya**, Director of the Collective Investment and Trust Management Department; the topic of day four of WIW was smart investor strategy, including the importance of choosing long-term investment products;
- **Sergey Shvetsov**, First Deputy Governor of the Bank of Russia; the topic of day five, the closing day of WIW, was providing answers to questions about investments in the Russian financial market.

On the third day of WIW, representatives of the Moscow Exchange held four online conferences and, among other things, spoke about the main risks of investing in the financial market, modern financial instruments for investment newcomers, FX market instruments and opportunities, and tax benefits for private investors.

Each online conference gathered on average 60-100 attendees. As of 23 October 2017, each video posted on the YouTube channel had been viewed on average 270 times.

4. During the week, employees of the Service's regional divisions delivered **lectures 'Smart Investors in the Financial Market'** to students of Russian regional universities. The Service prepared the presentation and materials for the speakers based on the information received from respective Bank of Russia divisions. They were designed to shape students' basic awareness about investment, main investment products and related risks, and the system of retail investor protection in the Russian financial market. The presentation is attached.

Three or five lectures were delivered to non-economic university and vocational school students in St. Petersburg, Rostov, Nizhny Novgorod, Vladivostok, Novosibirsk and Yekaterinburg.

The average outreach was 1,300 students.

5. **Members of the Expert Council on Financial Literacy under the Bank of Russia** (the Expert Council) and other financial market players participated in WIW arranging [webinars and on-site events dedicated to key investment topics](#). On-site events were held in Moscow, Sochi and Krasnoyarsk. They included workshops, conferences, educational lectures and quizzes at Russian universities, such as the Moscow State Institute of International Relations under the Russian Ministry of Foreign Affairs (MGIMO).

The following members of the Expert Council made the most valuable contribution to WIW, primarily webinars and on-site events: the Community for Financial Market Professionals Sapphire, the Federal Foundation for the Protection of Investors and Shareholders Rights, Smirnova & Co, Microfinance and Development - a Union of Microfinance Organisations (self-regulatory organisation), Parsa Company Group - a microfinance company, Moscow State Pedagogical University, JSC Otkritie Broker, JSC FINAM, and BCS Broker.

For example, the Federal Foundation for the Protection of Investors and Shareholders Rights and the Eurasian Economic Commission arranged **the II International Conference on the Protection of Investors' Rights** (the Conference) held on 11 October 2017 as part of WIW. The Conference was attended by more than 170 participants from six countries (Russia, China, Kazakhstan, Armenia, Kyrgyzstan and Italy). About 30 viewers, including foreign representatives, watched the live broadcast. The Conference was attended by representatives of the Bank of Russia, the State Duma of the Russian Federation, the Ministry of Internal Affairs of the Russian Federation, the Federal Financial Monitoring Service, embassies and representative offices of foreign states, financial market players and investors.

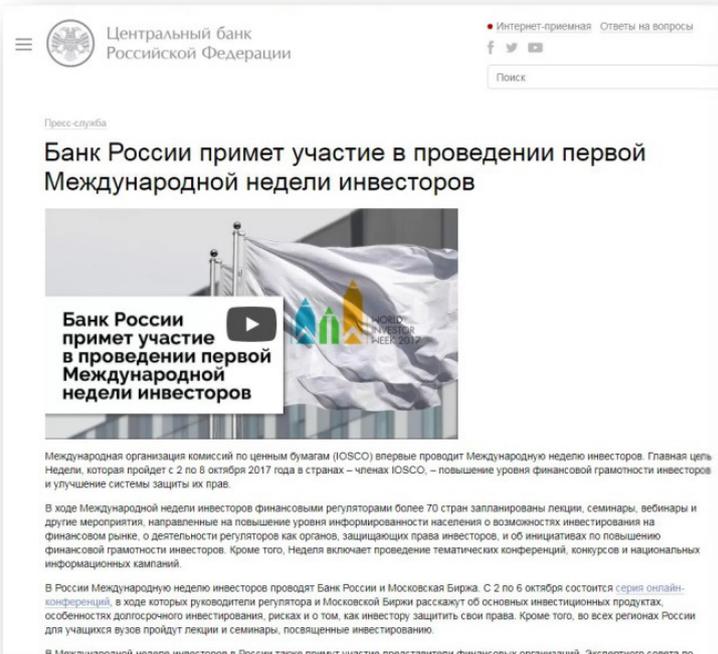
One of the Conference's sessions was dedicated to the creation of the investors' property rights protection system; it discussed the draft federal law 'On the Insurance of Individuals' Investments Held in Individual Investment Accounts'. The participants also discussed the development prospects and challenges to the financial market brought by the digital revolution. In particular, they touched upon the development and introduction of remote customer and investor identification systems, the use of distributed databases in the financial market infrastructure, regulation of the use of customers' and investors' personal data, and the risks of public involvement in risky crypto projects.

Preliminary estimates⁴ suggest that the audience of the online webinars held by the members of the Expert Council during WIW came to roughly 1,000 viewers while on-site events were attended by 1,500 participants.

⁴ Members of the Expert Council delivered 9 webinars (90 participants each, on average), 7 lectures and quizzes (60 students, on average), 7 workshops (80 participants, on average), and 2 conferences (200 participants, on average). The average estimate is based on the report conducted by the Expert Council's members.

Photo report WIW-2017

Welcoming video address by Sergey Shvetsov, First Deputy Governor of the Bank of Russia



Центральный банк Российской Федерации

Интернет-приемная | Ответы на вопросы

Поиск

Пресс-служба

Банк России примет участие в проведении первой Международной недели инвесторов

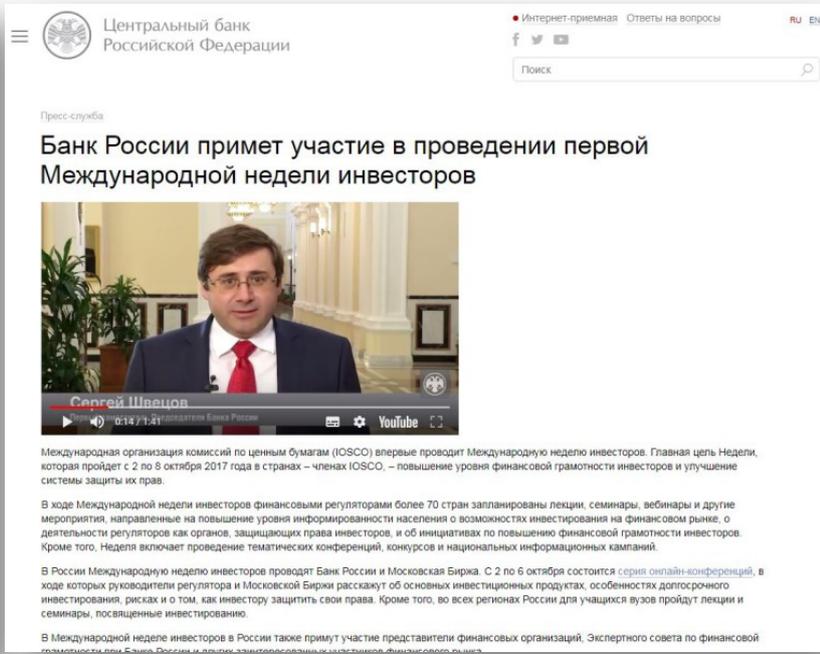
Банк России примет участие в проведении первой Международной недели инвесторов

Международная организация комиссий по ценным бумагам (IOSCO) впервые проводит Международную неделю инвесторов. Главная цель Недели, которая пройдет с 2 по 8 октября 2017 года в странах – членах IOSCO, – повышение уровня финансовой грамотности инвесторов и улучшение системы защиты их прав.

В ходе Международной недели инвесторов финансовыми регуляторами более 70 стран запланированы лекции, семинары, вебинары и другие мероприятия, направленные на повышение уровня информированности населения о возможностях инвестирования на финансовом рынке, о деятельности регуляторов как органов, защищающих права инвесторов, и об инициативах по повышению финансовой грамотности инвесторов. Кроме того, Неделя включает проведение тематических конференций, конкурсов и национальных информационных кампаний.

В России Международную неделю инвесторов проводит Банк России и Московская Биржа. С 2 по 6 октября состоится серия онлайн-конференций, в ходе которых руководители регулятора и Московской Биржи расскажут об основных инвестиционных продуктах, особенностях долгосрочного инвестирования, рисках и о том, как инвестору защитить свои права. Кроме того, во всех регионах России для учащихся вузов пройдут лекции и семинары, посвященные инвестированию.

В Международной неделе инвесторов в России также примут участие представители финансовых организаций, Экспертного совета по



Центральный банк Российской Федерации

Интернет-приемная | Ответы на вопросы

Поиск

Пресс-служба

Банк России примет участие в проведении первой Международной недели инвесторов

Сergey Shvetsov

0:14 / 1:51 | Видеоплатформа Банка России

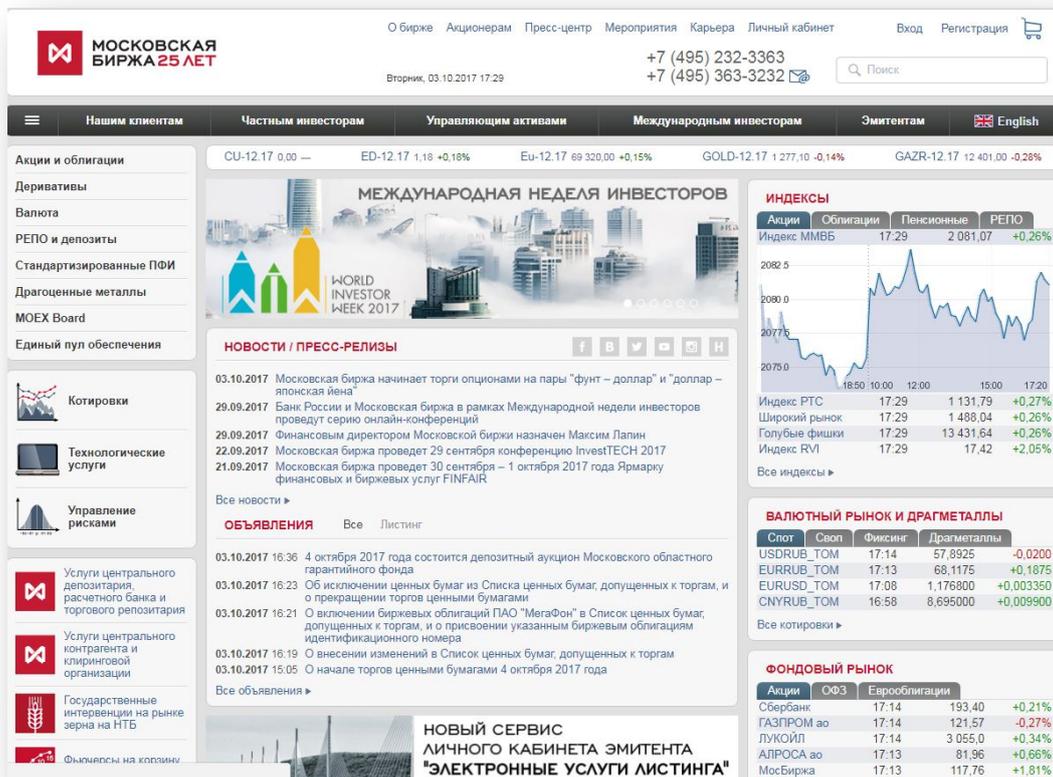
Международная организация комиссий по ценным бумагам (IOSCO) впервые проводит Международную неделю инвесторов. Главная цель Недели, которая пройдет с 2 по 8 октября 2017 года в странах – членах IOSCO, – повышение уровня финансовой грамотности инвесторов и улучшение системы защиты их прав.

В ходе Международной недели инвесторов финансовыми регуляторами более 70 стран запланированы лекции, семинары, вебинары и другие мероприятия, направленные на повышение уровня информированности населения о возможностях инвестирования на финансовом рынке, о деятельности регуляторов как органов, защищающих права инвесторов, и об инициативах по повышению финансовой грамотности инвесторов. Кроме того, Неделя включает проведение тематических конференций, конкурсов и национальных информационных кампаний.

В России Международную неделю инвесторов проводит Банк России и Московская Биржа. С 2 по 6 октября состоится серия онлайн-конференций, в ходе которых руководители регулятора и Московской Биржи расскажут об основных инвестиционных продуктах, особенностях долгосрочного инвестирования, рисках и о том, как инвестору защитить свои права. Кроме того, во всех регионах России для учащихся вузов пройдут лекции и семинары, посвященные инвестированию.

В Международной неделе инвесторов в России также примут участие представители финансовых организаций, Экспертного совета по

Moscow Exchange website – WIW banner



МОСКОВСКАЯ БИРЖА 25 ЛЕТ

О бирже | Акционерам | Пресс-центр | Мероприятия | Карьера | Личный кабинет | Вход | Регистрация

Вторник, 03.10.2017 17:29

+7 (495) 232-3363
+7 (495) 363-3232

Поиск

Нашим клиентам | Частным инвесторам | Управляющим активами | Международным инвесторам | Эмитентам | English

Акции и облигации | Деривативы | Валюта | РЕПО и депозиты | Стандартизированные ПФИ | Драгоценные металлы | MOEX Board | Единый пул обеспечения

Котировки | Технологические услуги | Управление рисками

Услуги центрального депозитария, расчетного банка и торгового репозитария | Услуги центрального контрагента и клиринговой организации | Государственные интервенции на рынке зерна на НТБ | Финансисы на коллину

CU-12.17 0,00 — | ED-12.17 1,18 +0,18% | Eu-12.17 69 320,00 +0,15% | GOLD-12.17 1 277,10 -0,14% | GAZR-12.17 12 401,00 -0,28%

МЕЖДУНАРОДНАЯ НЕДЕЛЯ ИНВЕСТОРОВ

WORLD INVESTOR WEEK 2017

ИНДЕКСЫ

Акции	Облигации	Пенсионные	РЕПО
Индекс ММВБ	17,29	2 081,07	+0,26%
Индекс РТС	17,29	1 131,79	+0,27%
Широкий рынок	17,29	1 488,04	+0,26%
Голубые фишки	17,29	13 431,64	+0,26%
Индекс RV1	17,29	17,42	+2,05%

Все индексы >

ВАЛЮТНЫЙ РЫНОК И ДРАГМЕТАЛЛЫ

Спот	Своп	Фиксинг	Драгметаллы
USDRUB_TOM	17,14	57,8925	-0,0200
EURRUB_TOM	17,13	68,1175	+0,1875
EURUSD_TOM	17,08	1,176800	+0,003350
CNYRUB_TOM	16,58	8,695000	+0,009900

Все котировки >

ФОНДОВЫЙ РЫНОК

Акции	ОФЗ	Еврооблигации	
Сбербанк	17,14	193,40	+0,21%
ГАЗПРОМ ао	17,14	121,57	-0,27%
ЛУКОЙЛ	17,14	3 055,0	+0,34%
АЛРОСА ао	17,13	81,96	+0,66%
МосБиржа	17,13	117,76	+1,81%

НОВОСТИ / ПРЕСС-РЕЛИЗЫ

03.10.2017 16:36 4 октября 2017 года состоится депозитный аукцион Московского областного гарантийного фонда

03.10.2017 16:23 Об исключении ценных бумаг из Списка ценных бумаг, допущенных к торгам, и о прекращении торгов ценными бумагами

03.10.2017 16:21 О включении биржевых облигаций ПАО "МегаФон" в Список ценных бумаг, допущенных к торгам, и о присвоении указанным биржевым облигациям идентификационного номера

03.10.2017 16:19 О внесении изменений в Список ценных бумаг, допущенных к торгам

03.10.2017 15:05 О начале торгов ценными бумагами 4 октября 2017 года

Все объявления >

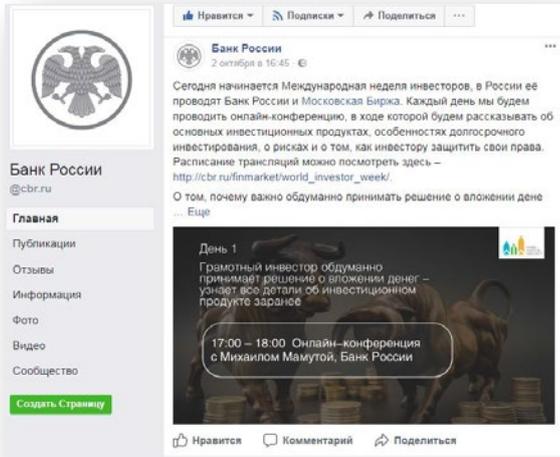
ОБЪЯВЛЕНИЯ

Все | Листинг

НОВЫЙ СЕРВИС ЛИЧНОГО КАБИНЕТА ЭМИТЕНТА "ЭЛЕКТРОННЫЕ УСЛУГИ ЛИСТИНГА"

Materials on the Bank of Russia's Facebook page

Day 1 2 October 2017



Банк России
@cbr.ru

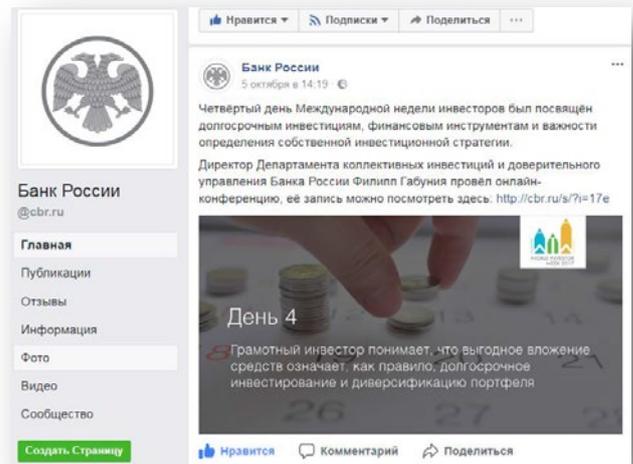
Сегодня начинается Международная неделя инвесторов, в России ее проводит Банк России и Московская Биржа. Каждый день мы будем проводить онлайн-конференцию, в ходе которой будем рассказывать об основных инвестиционных продуктах, особенностях долгосрочного инвестирования, о рисках и о том, как инвестору защитить свои права. Расписание трансляций можно посмотреть здесь – http://cbr.ru/finmarket/world_investor_week/.

О том, почему важно обдуманно принимать решение о вложении денег ... Еще

День 1
Грамотный инвестор обдуманно принимает решение о вложении денег – узнает все детали об инвестиционном продукте заранее.

17:00 – 18:00 Онлайн-конференция с Михаилом Мамутой, Банк России

Day 4 5 October 2017



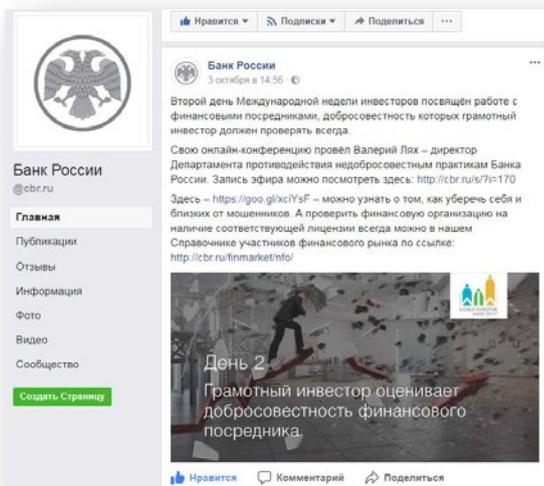
Банк России
@cbr.ru

Четвертый день Международной недели инвесторов был посвящен долгосрочным инвестициям, финансовым инструментам и важности определения собственной инвестиционной стратегии.

Директор Департамента коллективных инвестиций и доверительного управления Банка России Филипп Габуния провел онлайн-конференцию, ее запись можно посмотреть здесь: <http://cbr.ru/s/?i=17e>

День 4
Грамотный инвестор понимает, что выгодное вложение средств означает, как правило, долгосрочное инвестирование и диверсификацию портфеля.

Day 2 3 October 2017



Банк России
@cbr.ru

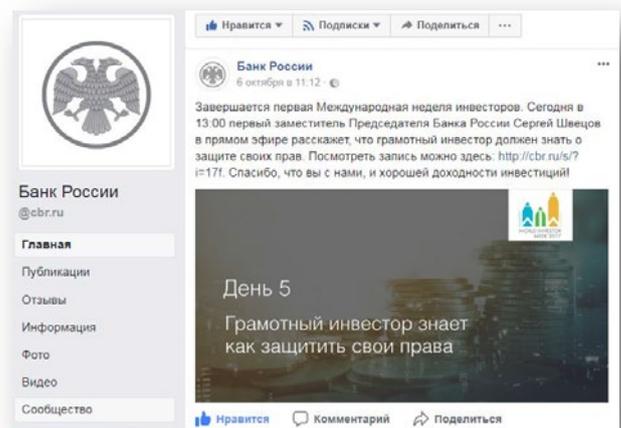
Второй день Международной недели инвесторов посвящен работе с финансовыми посредниками, добросовестность которых грамотный инвестор должен проверять всегда.

Свою онлайн-конференцию провел Валерий Лях – директор Департамента противодействия недобросовестным практикам Банка России. Запись эфира можно посмотреть здесь: <http://cbr.ru/s/?i=170>

Здесь – <https://goo.gl/xciYsF> – можно узнать о том, как уберечь себя и близких от мошенников. А проверить финансовую организацию на наличие соответствующей лицензии всегда можно в нашем Справочнике участников финансового рынка по ссылке: <http://cbr.ru/finmarket/info/>

День 2
Грамотный инвестор оценивает добросовестность финансового посредника.

Day 5 6 October 2017

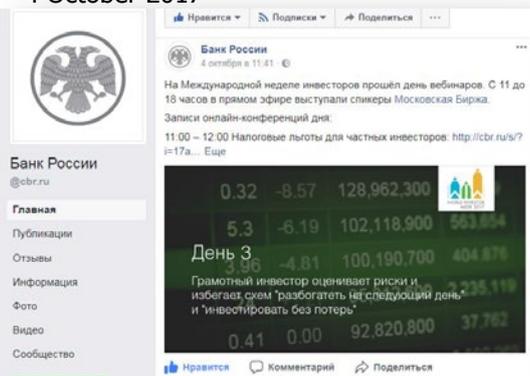


Банк России
@cbr.ru

Завершается первая Международная неделя инвесторов. Сегодня в 13:00 первый заместитель Председателя Банка России Сергей Швецов в прямом эфире расскажет, что грамотный инвестор должен знать о защите своих прав. Посмотреть запись можно здесь: <http://cbr.ru/s/?i=17f>. Спасибо, что вы с нами, и хорошей доходности инвестиций!

День 5
Грамотный инвестор знает как защитить свои права

Day 3 4 October 2017



Банк России
@cbr.ru

На Международной неделе инвесторов прошёл день вебинаров. С 11 до 18 часов в прямом эфире выступали спикеры Московской Биржи. Записи онлайн-конференций дня:

11:00 – 12:00 Налоговые льготы для частных инвесторов: <http://cbr.ru/s/?i=17a>... Еще

День 3
Грамотный инвестор оценивает риски и избегает схем "разбогатеть на следующий день" и "инвестировать без потерь"

0.32	-8.57	128,962,300	
5.3	-6.19	102,118,900	563,854
3.96	-4.81	100,190,700	404,876
			2,235,119
0.41	0.00	92,820,800	37,763

Online-conference of Bank of Russia and Moscow Exchange employees

Вопросы

Вопросов: 10 | Ответов: 6

Может ли ЦБ запретить банкам считать в свои целях «исход» «извест. продукт»?

Тема:

Будет ли концепция «вал. инвест. продукт» применена на российский рынок форекс? Или для рынка форекс будет создан отдельный рег. инструмент? Правильно ли мы понимаем, что обсуждаемая концепция будет использоваться только ограниченно, установившихся законодательством части деятельности форекс-дилеров?

Коллеги:

Добрый день, в каких источниках лучше смотреть информацию об инвестиц. инструментах, чтобы принимать более грамотные и обоснованные решения?

Александр Петрович:

Опыт развития рынка США показывает, что минимальный размер вложения на фондовом рынке (12) может позволить приобрести любой инвест. инструмент, потому что РФ не гарантирует устойчивый рост котировки иностранного фондового рынка? Особенно учитывая то, что на рынке депозитов ограниченная прибыль не предсказуемо. А на FX рынке мировой практике (Платформа, что инвестировать в

Day 1
2 October 2017

Mikhail Mamuta,
Head of the Bank of Russia Service for Consumer Protection and Financial Inclusion

Topic: Smart investors think carefully about their investment decisions and find out the details of an investment product in advance

Вопросы

Вопросов: 17 | Ответов: 5

С одной стороны Цб «советует» принимать решение о вложении средств самостоятельно с другой стороны, говорят о финансовых консул. тантах. Опаситесь, пожалуйста, идеальную модель поведения инвестора, и что нужно делать, чтобы не стать жертвой мошенников?

Люба:

Насколько мошеннические схемы ориентированы на определенные возрастные категории? Какие новые схемы появились за последнее время?

Аркадий:

Добрый день! У нас в стране с мошенниками кто только не борется – и полиция, и Роспотребнадзор, и вот еще ЦБ. Но мне кажется, что ловят

Day 2
3 October 2017

Valeriy Lyakh,
Director of the Bank of Russia Department for Countering Misconduct

Topic: Smart investors assess the credibility of financial intermediaries

Вопросы

Вопросов: 16 | Ответов: 0

Светлана Морозова:

Можно ли обналчить валюту, купленную на Валютном рынке Московской Биржи?

Анатолий Вассерман:

будет ли биржа выпускать свою криптовалюту?

Фролов Андрей:

С какого рынка лучше начинать инвестировать: с валютного, со срочного или с фондового?

Вика пов:

порекомендуйте что-нибудь из книг для изучения финансовых рынков

Фролов Андрей:

РАСКРЫТИЕ ИНФОРМАЦИИ

Настоящая презентация была подготовлена и выложена ЦБМ Московской Биржи (далее – «Компания»). Если нет какой-либо оговорки об ином, то Компания считается источником всей информации, изложенной в настоящей презентации. Данная информация представлена на основании на дату подготовки документа и может быть изменена без какого-либо уведомления.

Данный документ не является, не формирует и не должен рассматриваться в качестве предложения или же призыва к покупке или участию в покупке, или же, как публикация и приобретение или же в порядке на какие-либо ценные бумаги, а также этот документ или его часть или же сам этот документ распространены не являются основанием и не могут полагаться в связи с какими-либо предложениями, договорами, обязательствами или же инвестиционными операциями, связанными с ими, равно как и они не являются рекомендацией относительно ценных бумаг компании.

Изложенная в данном документе информация не является предостережением от совершения операции. В нее также не включены никакие виды, заверения или гарантии, «обеспечения» или «подкрепления» и никто не должен полагаться на достоверность, точность и полноту информации или мнения, изложенной здесь. Никто из Компании или каких-либо ее дочерних обществ или аффилированных лиц или директоров, сотрудников или работников, консультантов или их представителей не принимает какой-либо ответственности (связанной от того, кто, кто-либо не смог и/или осуществлял или не осуществил другого), помимо или независимо связанной с использованием этого документа или иным образом вытекающей из него.

Данные презентации содержат прогнозные заявления. Без исключения в настоящей презентации заявления, за исключением заявления об исторических фактах, включая, но не ограничиваясь, заявлениями, относящимися к будущим финансовым показателям, бизнес-стратегии, планы менеджмента и цели по будущим операциям являются прогнозными заявлениями.

Эти прогнозные заявления включают в себе известные и неизвестные риски, факторы неопределенности и иные факторы, которые могут стать причиной того, что наши результаты:

показатели, достигшие существенно отличия от таковых, полученных при проведении многолетних периодов стратегии и операций, и в будущем.

Важнейшие факторы, которые могут повлиять на наши прогнозные показатели, достижения, операции или же производственные показатели, которые могут существенно отличаться от тех, которые сформулированы или подразумеваются выше прогнозные заявления являются, помимо иных факторов, следующие: «неопределенность рыночных условий», предоставляемых Компанией и ее дочерними обществами; «неопределенность (а) Российской экономики и рынка ценных бумаг и (б) сектора с высоким уровнем конкуренции, в котором Компания и ее дочерние общества осуществляют свои деятельности, включая в (а) отечественной и международной законодательствах и налоговом регулировании и (б) государственных программах, стимулирующих и финансирующих рынок и рынок ценных бумаг»; «возможность участия в быстрых изменениях в научно-технической среде, включая способность использовать дисперсионные функциональные возможности, которые могут возникнуть среди клиентов Компании и ее дочерних обществ»; «возможность «свернуть» транзакции», «покупки» выданных новых коммерческих продуктов и услуг, равно как и поддержка конкурентоспособности; «возможность «привлечь» новых клиентов на отечественном рынке и в зарубежных юрисдикциях»; «возможность реализовать предостережения в зарубежных юрисдикциях».

Прогнозные заявления делаются только на дату настоящей презентации, и никто не гарантирует никаких будущих обязательств по обновлению или корректировке прогнозных заявлений в настоящей презентации в связи с изменением наших операций, или операций в условиях или обстоятельствах, не включенных в эти прогнозные заявления.

Day 3
4 October 2017

Igor Marich,
Board member – Managing Director of the Money and Derivatives Market at the Moscow Exchange

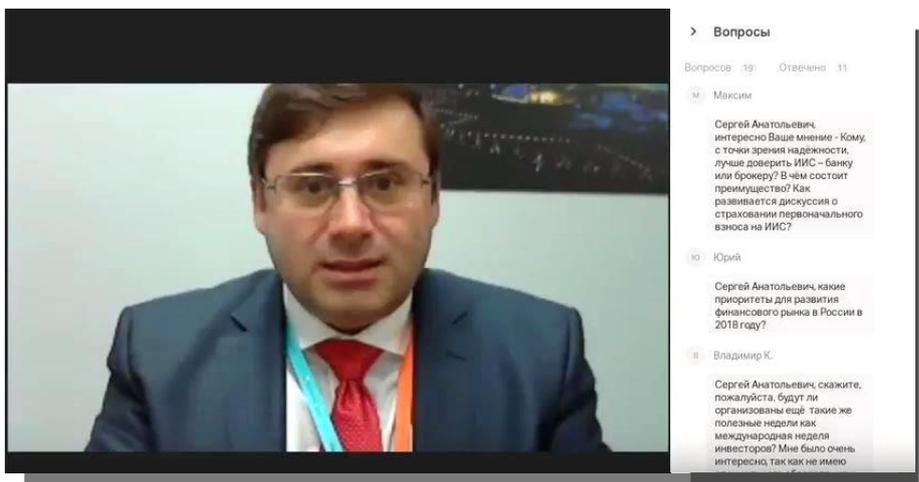
Topic: Smart investors assess their risks and understand that any type of investment is risky; they avoid strike-it-rich and zero-loss-investment schemes



Day 4
5 October 2017

Philipp Gabuniya,
Director of the Collective
Investment and Trust Management
Department

Topic: Smart investors realise that profitable investment usually means long-term investment and a diversified portfolio



Day 5
6 October 2017

Sergey Shvetsov,
First Deputy Governor of the Bank
of Russia

Topic: Smart investors know how to protect their rights

Lectures 'Smart Investors on the Financial Market' at Russian regional universities




Имя автора презентации

Грамотный инвестор на финансовом рынке



Банк России
Центральный банк Российской Федерации

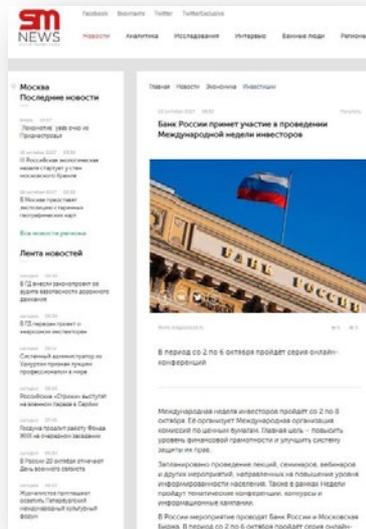


WORLD INVESTOR WEEK 2017



Events held by members of the Expert Council on Financial Literacy under the Bank of Russia







WORLD INVESTOR WEEK 2017

National Coordinator:

Other IOSCO members:

Other participants:

The Capital Market Authority (CMA), in the Kingdom of Saudi Arabia has participated in the World Investor Week 2017 (WIW2017). The WIW2017 was a week-long global campaign that ran from 2-8 October 2017; and revolved around the importance of investor education and protection.

Saudi Arabia took part in the campaign via social media to increase awareness and financial education by projecting key messages that include:

- Awareness role in protecting investors
- Emphasize institutional investment
- Using diversification as an investment risk management tool
- The importance of understanding risks and finding suitable investment tools
- The education to balance between savings and investments

The CMA's participation was through an integrated social media campaign on Twitter, Facebook, LinkedIn, Instagram, YouTube and Google Plus. It is worth mentioning, that social media presence is vital in Saudi Arabia with around 200K followers/ subscribers who are actively engaging; whereas Twitter is considered to be the most actively engaging platforms used in the country, in addition to being the strongest presence for the CMA:

- Focused on 14 messages:
 - 8 Designs
 - 3 videos
 - 3 messages
- Results:
 - Impressions: 1.7 M
 - Engagement: 380K

The Saudi CMA is looking forward to participate in the annual awareness campaign in future, for further investor awareness and financial education.





WORLD INVESTOR WEEK 2017

National Coordinator:

Other IOSCO members:

Other participants:

In Singapore, MoneySENSE (this the national financial education programme chaired by the Monetary Authority of Singapore), together with our Institute for Financial Literacy (IFL), the Securities Investors Association (Singapore) (SIAS) and the Singapore Exchange (SGX), organised the inaugural “World Investor Week in Singapore (WIWS) from 2 to 6 October 2017. The theme was “Investing with Confidence”. We wanted to attract investors (mainly new or inexperienced) to become more confident investors.

WIWS adopted a “townhall” approach to investor education, where interactive sessions were organised at SGX Auditorium for investors to engage with a panel of investment experts on various investment topics such as:

- **Investing with confidence** – for investors to learn or relearn basic investing principles and what it means to be a prudent and confident investor.
- **How to be a better investor** – developing good investing habits – what are the behaviours we need to keep in check and how can we manage ourselves better?
- **Developing your own market outlook** – learn about the data and indicators to track and to make sense of as you invest.
- **Digital Financial Services and You** – today, we can crowdfund online, get insured P2P or be advised by robots at a click, swipe or flash. Is all this as simple as it sounds?

Given our multi-faceted topics, we selected panellists who were either industry veterans from the more traditional financial institutions or those at the forefront of Fintech/Digital Financial Services.

Our panellists included:

- Christopher Tan, CEO of a firm of independent financial advisers,
- Chen Peng, CEO Asia, Dimensional Fund Advisers,
- Freddy Lim, Co-founder and CIO of robo-adviser StashAway,
- Altona Widjaja (VP Fintech, Open Vault OCBC – accelerator & fintech arm of OCBC)
- Kelvin Teo (Co-founder, Funding Societies – P2P lending platform)
- Two veteran journalists: Goh Eng Yeow from our national newspaper, Straits Times and David Kuo, CEO of Motley Fool Singapore.

To facilitate interactivity and to shape the direction of discussions, participants were invited to submit queries ahead of the event (via pigeonhole). Participants voted for the queries they wanted addressed. Questions were also invited from the floor at regular intervals throughout the session. The discussions were lively. We saw a range of questions on topics like diversification and investing with a modest budget and knowing when to sell in a falling market, to how one can use economic and market news when investing. The panellists shared their views and debated their differences, while tackling questions from participants on current investment topics. Having a range of perspectives articulated well and the fact that there was some debate and occasional differences in opinion helped drive home the point that investors really must assess for themselves what will make the most sense to them. Particularly since everyone's circumstances are different, with unique risk appetites and investment needs.

The event was well-received and we are encouraged to explore more "townhalls" as a platform for more fruitful investor-industry-media exchanges going forward.

The event was free and open to the public.



WORLD INVESTOR WEEK 2017

National Coordinator: Financial Services Board

Other IOSCO members:

Other participants:

The Financial Services Board (FSB) in South Africa used an existing project as part of their World Investor Week (WIW) activities. A pilot project that kick started the FSB's investor education programme, commenced in July 2017 and ran through WIW until November 2017. The project was implemented in collaboration with the Cooperative Banks Development Agency (CBDA). The main objectives of the project were to enhance cooperative members' financial management knowledge and awareness of different investment products.

The project comprised of 27 workshops across the Limpopo province in South Africa and 547 participants, of which 21% of participants were aged 39 or below. An external monitoring and evaluation company was appointed and of the sample of workshop attendants that were contacted for follow up calls, 71% of respondents indicated that they found the workshops to be essential. Additionally, workshop observations revealed that participants generally showed an interest in the topics covered and engaged in conversation with the facilitator, although the level of engagement dropped when discussing topics such as Shares, Unit Trusts, and Bonds. It was further noted that workshop participants were less familiar with these investment products, indicating that there was a need for financial education in these areas.

The follow-up calls also revealed that 50% of respondents reported that they were using the information they learned during the workshops. Importantly, 18% of those who reported to be using what they learned were doing so for investing purposes. This was a positive finding given the project's objective of educating participants on the investment options available to them in order to enable them to make sound investment decisions.



WORLD INVESTOR WEEK 2017

National Coordinator:

Other IOSCO members:

Other participants:

CNMV has supported the first edition of the World Investor Week.

In Spain, the World Investor Week (WIW) was held at the same time that the National Financial Education Day.

Media release:

At the start of the week, IOSCO's press release was published on the social media to announce the WIW. Throughout the week, CNMV promoted the WIW by having the logo on its homepage (see picture below). At the end of the week, the CNMV published on the social media IOSCO's press release announcing the success of the first edition of WIW.

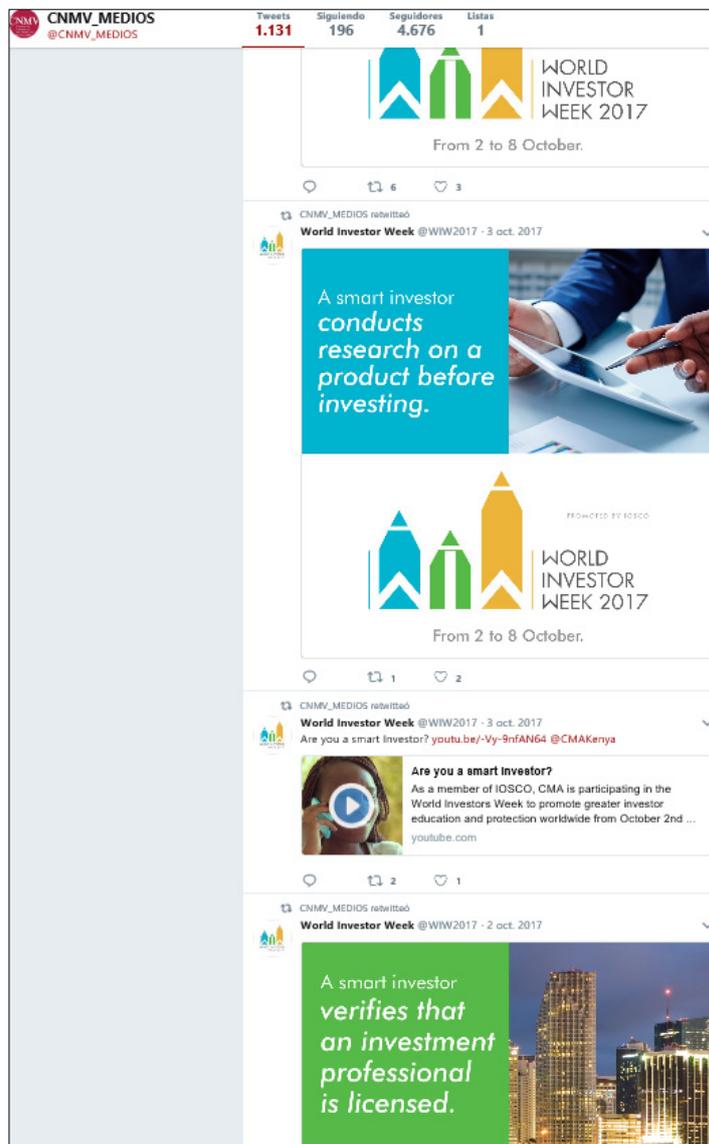


Social media:

CNMV shared ten posts on Twitter during the week. Some of the posts were:

- A smart investor recognizes the importance of diversification.
- A smart investor recognizes the benefit of long-term, regular and diversified investment.
- A smart investor plans for and invest according to his/her needs and goals
- A smart investor recognizes the power of compound interest
- A smart investor avoid “get rich quick” and “can’t lose” schemes.
- Etc.

Each of the social posts reached more than 4500 people.



WORLD INVESTOR WEEK 2017

National Coordinator: Finansinspektionen

Other IOSCO members:

Other participants: Gilla Din Ekonomi

On 3 October during World Investor Week, Finansinspektionen organized a seminar for self-employed individuals, entrepreneurs and freelancers. The seminar was about the future salary of self-employed individuals – more specifically, their pension. Self-employed individuals need to be more knowledgeable about financial matters so they are aware of how they should be saving for retirement. As a group, they need more information about the pension system than individuals in Sweden who hold regular employment.

Self-employed individuals are often a forgotten target group, but they benefit just as much as employed individuals from retirement skills. During the seminar, experts from the Gilla Din Ekonomi (“Like Your Economy”) network offered handy tips on how sole proprietorships more efficiently keep track of their pension money more efficiently.

A total of 51 entrepreneurs attended the seminar. Among those who submitted an evaluation, all of them gave the seminar a top rating of 4/5 in usefulness. The tools presented on how to invest, save and manage pension money were repackaged as a short film that was published shortly after the seminar. The film is estimated to have a life span of two years and has now been spread to the target audience.

Photo 1 of lecturers (l to r):

Johanna Kull, Fondbolagens förening. Jens Magnusson, SEB. Anders Kollberg, Kollberg & Enqvist. Monica Zettervall, Pensionsmyndigheten. Kristina Althoff, Finansinspektionen.





WORLD INVESTOR WEEK 2017

National Coordinator:

Other IOSCO members:

Other participants:

The Securities and Exchange Commission (SEC), Thailand held the “SEC Retirement Savings Symposium” as part of its 25th anniversary commemoration events and as part of the IOSCO’s promoted World Investor Week campaign.

This one-day event is the kickoff to the organization’s campaign to raise awareness of target audience, i.e. employers and employees with provident funds (PVD), about the importance of retirement savings and planning, as Thailand will become an aged society in 2025. In the pipeline, the SEC together with campaign partners, i.e. asset management companies that provide provident fund management services, the Stock Exchange of Thailand (SET), and the Association of Provident Fund (AOP), will encourage employers to help their employees reach the goal of sufficient savings through provident funds for a happy retirement.

Activities during the event include talks/discussions on relevant topics, demonstration of the online tool “PVD retirement checkup” that PVD members can use to check if their retirement savings is on track, booth exhibition that target groups can seek advice from PVD service providers, and talk show by a famous speaker to urge the audience to seriously consider making investment as part of their financial planning for retirement.

The event was attended by more than 1700 targeted participants, 82% of which said that they were very satisfied with the event whereas 97% requested that the SEC organize this type of event again next year. The event including all key messages were also mentioned in wide-ranging online and offline media, e.g. TV/radio programs and interviews, articles by bloggers and in newspapers, news websites, social media of news agencies etc.







WORLD INVESTOR WEEK 2017

National Coordinator:

Other IOSCO members:

Other participants:

CMB is the sole governmental authority responsible from setting and conducting “Financial Education” policies in Turkey. Within this respect as a special part of the Financial Education, CMB favors all of the initiatives regarding “Investor Education”. Keeping this fact in mind, CMB favored World Investor Week 2017 and organized a very special public event through one of the highest ranked Turkish branch of the global TV channel, unique channel on finance and economics in Turkey, Bloomberg HT Turkiye during 02-08.10.2017. For the whole week, in every hour, and between each programs; public awareness podcasts on investor education has been featured on the Bloomberg HT Turkiye. This event aimed to increase the public awareness on investor education. We don’t have a specific number of the people of which CMB has reached.

Following public podcasts has been featured;

Before Investing;

Make sure to determine your aim, your risk level and the maturity of the investment!

Before Investing;

Be cautious in choosing the Investment Company or the Investment Advisors and check the availability of the licenses!

Before Investing;

Search for the appropriate financial products. Information will make you to move a one step forward.

Before Investing;

Take into account the charges and transaction costs!

Before Investing;

Recall that riskless investment never exists!

Before Investing;

Refrain from the investment opportunities offering “Fast/Easy way of Profit” “You will never lose”!

Before Investing;

Diversify your risk! Rather than allocating your assets to a single financial product, make investment diversification!

Before Investing;

Plan your preferences based on your future needs, and goals!

Before Investing;

Keep in mind that Long term, proper and diversified investments are always more advantageous.



WORLD INVESTOR WEEK 2017

National Coordinator: U.S. Securities and Exchange Commission

Other IOSCO members:

- Financial Industry Regulatory Authority (FINRA)
- U.S. Commodity Futures Trading Commission (CFTC)

Other key participants:

- North American Securities Administrators Association (NASAA)
- National Futures Association (NFA)

During World Investor Week, SEC staff, FINRA, CFTC and supporters participated in various outreach events and activities with a goal of amplifying WIW's key messages.

Some noteworthy activities and accomplishments in the United States include:

- IOSCO members and WIW supporters reached over one million investors.
- On October 2, 2017, the [SEC](#) and [FINRA](#) issued press releases to promote World Investor Week. FINRA's related blog post became an editor's pick on Nasdaq.com and was syndicated through a national column on retail investing.
- The SEC's Office of Investor Education and Advocacy issued a [joint investor bulletin](#) with the CFTC, FINRA, and NASAA.
- NFA, together with representatives from the CFTC, SEC and FINRA, conducted a [webinar](#) entitled, "Investor protection: A worldwide impact starts with you."
- SEC staff, FINRA (and the FINRA Foundation) and WIW supporters participated in dozens of in-person events throughout the week and actively promoted World Investor Week online and via social media.



SEC Chairman Jay Clayton, FINRA President Robert Cook, and SEC Office of Investor Education and Advocacy (OIEA) Director Lori Schock talk to seniors about the importance of investor education on October 5, 2017 (left). SEC and FINRA staff distribute investor education and World Investor Week materials to audience (right).



More than 10,000 U.S. federal government employees and military service members watched the SEC's webcast on the Thrift Savings Plan. OIEA Director Lori Schock (far right) talks to the audience about Thrift Savings Plan distribution options, fees, and how to avoid scams.



SEC staff educates students on smart investing at Gallaudet University (left) and at Virginia Commonwealth School of Pharmacy (right).



SEC staff chat with Twitter followers about robo-advisers — the chat reached over 358,000 people and received nearly 6 million impressions.



The SEC's Miami office visits the Miami Vet Center – one of several World Investor Week events focused on members of the military and their families.

WORLD INVESTOR WEEK 2017

National Coordinator: Securities and Exchange Commission (SEC)

Other IOSCO members: N/A

Other participants: Ministry of Finance, Ministry of General Education, Capital Markets Association of Zambia, Bank of Zambia, Pensions and Insurance Authority, Lusaka Securities Exchange, Laurence Paul, DeVeere Zambia, Madison Asset Management Company, Stockbrokers Zambia, Benefits Consulting, Investrust Bank Zambia Plc, Financial Sector Deepening Zambia, Aflife Financial Services, Standard Chartered Bank Zambia, Business Studies Teachers Association of Zambia, QTV, Diamond TV, Radio Christian Voice, UNZA Radio, financial education providers etc.

Zambia through the Securities and Exchange Commission Zambia participated in the World Investor Week (WIW) 2017 from 2nd – 8th October 2017. Below is a report on the main activities undertaken during the commemoration of the investor awareness and sensitization campaign.

1. Stakeholders planning meeting

A first stakeholders planning meeting was held at the Securities and Exchange Commission (SEC) offices on 28th August 2017. The objective of the meeting was to inform stakeholders about the commemoration of the awareness and sensitization campaign as well as to request them to participate in planned activities.

2. Press Release for the World Investor Week 2017

The Securities and Exchange Commission Zambia issued and shared a media release with various media houses on 29th September 2017. The media release highlighted mainly; the objectives and planned activities to be undertaken during the awareness and sensitization campaign.



3. Launch Address by Minister of Finance World Investor Week 2017

A pre-launch Ministerial Address for the World Investor Week 2017 was made by the Minister of Finance, Honourable Felix Mutati, MP and aired on national television ZNBC TV1 on 1st October 2017.

Excerpt from Launch Address: *“Country Men and Women, this commemoration of the World Investor Week is themed as ‘A Smart Investor through Capital Markets’ for the obvious reason that one must have the appetite to invest or generate money and also the prowess to mitigate risks associated with undertaking an investment.”* Hon. Felix Mutati – Minister of Finance.



Launch Address by the Honourable Minister of Finance

4. Familiarisation tour of the Lusaka Securities Exchange by Secondary School pupils

The Securities and Exchange Commission in collaboration with the Lusaka Securities Exchange (LuSE) organized a tour of the exchange for Secondary school pupils on 2nd October 2017. The tour was attended by 50 pupils from 7 schools participating in our ongoing Capital Markets Schools Challenge and gave them an opportunity to get a deeper understanding of the roles and functions of the SEC and the LuSE as well as those of other capital market operators.



Secondary school pupils participate in a familiarization tour of the Lusaka Securities Exchange



Secondary school pupils listen attentively and ask questions on careers with the capital markets

5. Public exhibition by stakeholders

A public exhibition was held on 5th and 6th October 2017 at Mandahill Mall, which is one of the biggest malls in Lusaka. Capital market operators participated in the exhibition and they took time to educate and sensitize passersby about investing through the capital markets, the types of products and services offered within the sector and the benefits associated with investing their money etc.



Setting up at a Public Exhibition at Mandahill Mall



SEC members of staff interact with shoppers



Brokers interact with passersby



Investor education during the exhibition

6. Symposium for Business Studies Teachers Association of Zambia

The Securities and Exchange Commission Zambia, in collaboration with its partners hosted a symposium for Business Studies teachers at Government Complex in Lusaka on 7th October 2017. The symposium was attended by over a hundred teachers from all the ten (10) provinces of Zambia and was aimed at improving the delivery of capital market content to pupils by the teachers of business studies. In addition, capital market operators as well financial sector regulators set up a mini exhibition at the event venue.



Teachers of Business Studies in attendance during the Symposium for Business Studies at Government



Exhibition walk through at the teacher's symposium

7. Media Programmes

The Securities and Exchange Commission Zambia featured on TV, Radio and Social Media programmes e.g. face book and twitter Media programmes during the week of the commemoration. TV and Radio programmes also featured other capital market professionals from the Capital Markets Association of Zambia, stockbrokers, investment advisers and fund managers.



World Investor Week 2017 Radio Programme on University of Zambia 'UNZA' Radio



Investor awareness on the Securities and Exchange Commission face book page during World Investor Week

8. Conclusion

The Securities and Exchange Commission Zambia received favourable feedback from the various interactions and activities undertaken during the commemoration of the inaugural World Investor Week. SEC Zambia look forward to participating in future World Investor Week commemorations.

REPORTS OF SUPPORTING ENTITIES

WORLD INVESTOR WEEK 2017

International Coordinator: Financial Planning Standards Board (FPSB)

Other participants: FPSB Member Organizations in 21 Territories

Financial Planning Standards Board (FPSB) and the global financial planning community of nonprofit member organizations were pleased to participate in World Investor Week and host the first World Financial Planning Day on Wednesday, 4 October.

During World Investor Week and World Financial Planning Day, FPSB and its network of member organizations representing a global community of over 170,000 CERTIFIED FINANCIAL PLANNER professionals provided programs to increase consumers' level of financial literacy and capability, and to help consumers understand the value of financial planning and making investment choices within the context of financial and life goals. Events included pro-bono clinics, seminars and roadshows, webinars and videos, press releases, articles and social media campaigns.



Participation in World Investor Week included FPSB Members in Australia, Austria, Brazil, Canada, Chinese Taipei, France, Germany, Hong Kong, India, Indonesia, Japan, Malaysia, People's Republic of China, Republic of Korea, Singapore, South Africa, Thailand, The Netherlands, Turkey, the United Kingdom and the United States.

FPSB Member Activities

FPSB Members promoted World Investor Week and World Financial Planning Day on their own websites, as well as through articles, blogs and news releases; social media campaigns; e-newsletters; radio and Facebook live events; in person events, proactive media placements, photos, videos and regulatory engagement.

Articles, Blogs and News Releases

FPSB Members issued a total of 49 communiques during World Investor Week and World Financial Planning Day, which were picked up by national and trade publications, potentially generating more than **18 million impressions**.

Social Media

All participating FPSB Members leveraged social media to promote World Investor Week and World Financial Planning Day, receiving over 350 shares, more than 1,000 clicks and reaching over **500,000 consumers worldwide**.

Email Campaigns

FPSB Members in Australia, Brazil, Germany, Hong Kong, Turkey, the United Kingdom and the United States launched 12 email campaigns to their stakeholders, resulting in

155,313 people reached, an average open rate of 28 percent and click-through rates as high as 27 percent.

TV, Radio and Facebook Live

FPSB Members in Brazil, Hong Kong and Malaysia engaged in 11 interviews and events on the radio and through Facebook live, receiving **70,347 views** and more than 550 interactions.

Events

Nine FPSB Members (Brazil, Chinese Taipei, India, Indonesia, Malaysia, Singapore, South Africa, Thailand, Turkey) conducted a total of 27 events during World Investor Week, including workshops, pro-bono events, lectures, panels, and seminars. These events reached over **2,000 attendees**, collectively.

An attached PowerPoint presentation contains photos and examples of FPSB Member activities held throughout World Investor Week.

World Investor Week 2018

The FPSB network is excited for World Investor Week 2018 and looks forward to partnering once again with IOSCO and securities regulators globally to host World Financial Planning Day during World Investor Week to empower more consumers to take control of their finances and their future.

To help WIW 2018 be as successful as possible, the FPSB network recommends:

- 1) Additional lead time to coordinate events to coincide with World Investor Week, cultivate volunteers and ambassadors, and prepare marketing materials;
- 2) Expanding WIW to two weeks to avoid national holidays;
- 3) Increased collaboration between FPSB member organizations and their local IOSCO member.

It was a pleasure to work with IOSCO C8 on this important initiative to raise awareness about the importance of investor education, and to increase consumers' level of financial literacy and capability. We look forward to World Investor Week becoming a part of the IOSCO agenda for years to come.



FPSB's Director of Stakeholder Engagement, Kate Holmes, CFP, and international CERTIFIED FINANCIAL PLANNER professional attendees at the 4 October 2017 Financial Planning Association Annual Conference in Nashville, TN, USA following a social media t-shirt giveaway. The World Investor Week logo is on the back of the t-shirts!



FPSB CEO Noel Maye with IOSCO C8 Chairperson José Alexandre Vasco

ANNEX 1 - COMMITTEE ON RETAIL INVESTORS (COMMITTEE 8) MEMBERS

Members (38)	
Comisión Nacional de Valores	Argentina
Australian Securities and Investments Commission	Australia
Financial Services and Markets Authority	Belgium
Comissão de Valores Mobiliários (Chairman)	Brazil
China Securities Regulatory Commission	China
Autorité des marchés financiers	France
Bundesanstalt für Finanzdienstleistungsaufsicht	Germany
Securities and Futures Commission	Hong Kong
Securities and Exchange Board of India	India
Indonesia Financial Services Authority	Indonesia
Israel Securities Authority	Israel
Commissione Nazionale per le Società e la Borsa (Vice-Chairman)	Italy
Financial Services Agency	Japan
Jersey Financial Services Commission	Jersey
Financial Services Commission/Financial Supervisory Service	Korea, Republic of
Commission de Surveillance du Secteur Financier	Luxembourg
Securities Commission	Malaysia
Comisión Nacional Bancaria y de Valores	Mexico
The Dutch Authority for the Financial Markets	Netherlands, The
Securities and Exchange Commission	Nigeria
Ontario Securities Commission	Ontario
Comissão do Mercado de Valores Mobiliários	Portugal
Autorité des marchés financiers	Quebec
Financial Supervisory Authority	Romania
The Bank of Russia	Russia
Capital Market Authority	Saudi Arabia
Monetary Authority of Singapore	Singapore
Financial Services Board	South Africa
Comisión Nacional del Mercado de Valores	Spain
Securities and Exchange Commission of Sri Lanka	Sri Lanka
Finansinspektionen	Sweden

Financial Supervisory Commission	Chinese Taipei
Securities and Exchange Commission	Thailand
Capital Markets Board	Turkey
Financial Conduct Authority	United Kingdom
Commodity Futures Trading Commission	United States of America
Financial Industry Regulatory Authority	United States of America
Securities and Exchange Commission	United States of America
Observers (2)	
European Securities and Markets Authority	European Union
Japan Securities Dealers Association	Japan



WORLD INVESTOR
WEEK 2017

PROMOTED BY IOSCO