

**SKILLS FRAMEWORK FOR FINANCIAL SERVICES
TECHNICAL SKILLS AND COMPETENCIES (TSC) REFERENCE DOCUMENT**

TSC Category	Investment and Financial Management					
TSC	Qualitative Analysis					
TSC Description	Formulate research questions and hypotheses, identify qualitative data sources for analysis of securities and provide investment recommendations based on analysis					
TSC Proficiency Description	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6
			FSE-ACE-3020-1.1	FSE-ACE-4020-1.1	FSE-ACE-5020-1.1	
			Gather qualitative data and formulate research questions to perform analysis of securities	Verify and assess analysis performed to provide suitable investment recommendations	Guide qualitative analysis methods strategy and finalise investment recommendations	
Knowledge			<ul style="list-style-type: none"> Research questions and typical underlying assumptions and hypotheses Appropriate qualitative data sources Qualitative security analysis methods Qualitative variables affecting investment viability 	<ul style="list-style-type: none"> Research questions and typical underlying assumptions and hypotheses Appropriate qualitative data sources Qualitative security analysis methods Qualitative variables affecting investment viability 	<ul style="list-style-type: none"> Appropriate qualitative data sources Qualitative security analysis methods Evaluation of qualitative analysis methods 	
Abilities			<ul style="list-style-type: none"> Craft relevant research questions and hypotheses Identify and select appropriate qualitative data sources Determine and extract relevant qualitative data for investment purposes from sources selected Analyse securities to determine investment viability against organisation criteria 	<ul style="list-style-type: none"> Propose investment recommendations based on the analysis performed Assess information collected and determine its accuracy and validity Assess appropriateness of research questions, hypotheses and data sources selected Review and provide additional insights for qualitative analysis before reporting findings 	<ul style="list-style-type: none"> Establish criteria of evaluation for analysing investment viability from qualitative data Evaluate analysis conducted to finalise investment recommendations Establish guiding strategies to identifying relevant qualitative data sources Develop policies to improve qualitative analysis methods and investment performance Define qualitative analysis techniques 	

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