

CFA Society Sri Lanka

Capital Market Awards Sri Lanka 2026

Evaluation Criteria for Best Stockbroking Research Team Award

1. **Breadth of coverage**, including but not limited to, the number of sectors covered and the number of companies under core coverage that include a comprehensive financial model. Under this category the team will also be evaluated on the distinguishable types of reports produced and the number of reports issued within each of these categories.
2. **Depth of coverage and quality of research**, including but not limited to, the number of different reports published under multiple categories and the quality of industry knowledge, valuations, and consistency of quality within each of these reports.
3. **Dissemination of reports and timeliness** including but not limited to, the number of different channels of distribution, the time-lag between a company's earnings/news release and the publication and release of a research report, and the accessibility of research reports. The timeliness of ideas and responsiveness to investor requests will also be evaluated within this category.
4. **Forecasts and stock picking accuracy**, will be evaluated based on the deviation of forecasts from actuals, the independent analysis of companies including the number of sell reports issued within a period and the publication of deviations from forecasts.
5. **Access to Corporates and Investor education**, will be evaluated based on the number of one-on-one meetings/calls held with corporates and the number and frequency of institutional and retail investor events, including but not limited to roadshows, seminars, workshops and other outreach/educational initiatives.
6. **Adoption of Technology & innovation in research ideas and delivery**, will be evaluated based on the use of non-standard methods of research and research dissemination, including but not limited to the use of AI tools.
7. **The Stockbroker research team's research practices and code of conduct will also be evaluated against the CFA institutes' Research Objectivity standards** to ensure that the team is able to conduct independent research and make objective recommendations.