EXECUTIVE PROGRAMME

CFA Society Singapore

CFA Society Singapore ESG Workshop for Directors & Senior Managers

IBF Programme Code: P220221AIZ

COURSE INSTRUCTORS

Edris Boey
Hardik Shah, CFA
Kanol Pal, CFA

COURSE FEE

CFA Society Singapore member:
S$1,350*

Non member:
S$1,500*

*(*Price subject to 7% GST)*

REGISTER NOW

Group discount available.
Contact us to find out more!

23 & 24 June 2022

Day 1: 9am to 3pm | Day 2: 9am to 1pm

(including lunch and tea breaks)

1.5 DAYS

On site
Instructor-led course
in a premier hotel

UP TO 80% - 90%*

IBF- FTS
Enhanced Funding
Support

*(*Subject to eligibility)*

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8 CPD & PL Hours

(Each participant will get an E-Certificate upon completion)

ABOUT THE COURSE

This course will equip participants with an overview, knowledge and practical application in the integral and fast-growing field of environmental, social and governance (ESG). Societal pressure, local regulation and the growing evidence of the financial benefits of incorporating ESG practices have led to ESG being mainstream.

LEARNING OUTCOMES

By the end of this workshop, participants should have:

- An understanding of the context for different approaches to environmental, social and governance (ESG) factors
- An understanding of the underlying issues that constitute factors within each of the environmental, social and governance areas
- An understanding of the broader sustainability context and global initiatives
- An understanding of the ESG market: relevance, size, scope, key drivers and challenges, and risks and opportunities
- An understanding of environmental factors, systemic relationships, material impacts, megatrends and approaches to environmental analysis at country, sector and company levels
- An understanding of social factors, systemic relationships, material impacts and approaches to social analysis at country, sector and company levels
- An understanding of governance factors, key characteristics, main models and material impacts
- An understanding of engagement and stewardship

WHO SHOULD ATTEND?

- Directors
- Aspiring Directors
- C- Suites
- Aspiring C- Suites
- Corporate Leaders
- Senior Managers
- Aspiring Senior Managers
- Compliance Managers

WHY TAKE THIS COURSE?

- Fulfill regulatory requirement for ESG training
- This course draws heavily from material developed by CFA Institute, a global premier organization for investment management professionals
- The material was developed in consultation with leading firms and supported by the UN Principles for Responsible Investment (PRI), which will enable you to expand your ESG knowledge and develop the skills and competencies to fulfil both your responsibilities and your firm's responsibilities
- This course can help you gain an edge in a fast-moving and still evolving ESG market
- Be part of the solution to existential issues impacting the world we live in

COURSE OUTLINE

Case studies and a panel discussion would be utilised to deliver the course in an engaging manner

Unit 1: Introduction to ESG

- What is ESG investing?
- Types of responsible investment
- Why integrate ESG?
- Putting ESG into practice
- Key initiatives

Unit 2: The ESG Market

- History
- ESG investing in numbers
- Market drivers of ESG and challenges in ESG integration

Unit 3: Environmental Factors

- Key environmental issues
- Systemic relationships between business activities and environmental issues
- Key "megatrends" and drivers influencing environmental change in terms of potential impact on companies and their environmental practices
- Assessment of materiality of environmental issues
- Approaches to account for material environmental analysis and risk management strategies
- Apply material environmental factors to financial modelling, ratio analysis and risk assessment
- Opportunities relating to climate change and environmental issues

Unit 4: Social Factors

- Social megatrends and their effects
- Key social issues and business activities
- Identifying material social factors for investors
- Application of social factors in investments

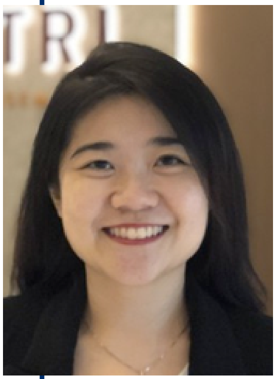
Unit 5: Governance Factors

- What is governance? Why does it matter?
- The development of a formalised governance approach
- Shareholder engagement and minority shareholder alignment
- Key characteristics and structural differences
- Why audit matters and what matters in the audit
- Impact of governance on investment opportunities
- Incorporating governance into investment and stewardship processes

Unit 6: Engagement and Stewardship

- What is stewardship? What is engagement?
- Why engagement?
- Codes and standards
- Engagement styles
- Practicalities of effective engagement
- Asset classes

COURSE INSTRUCTORS



Edris Boey is Head of ESG Research at Maitri Asset Management ("Maitri") and is responsible for developing and maintaining the firm's proprietary Responsible Investment Approach. Starting her career as a Financial Auditor at KPMG, Edris subsequently moved into the Climate Change & Sustainability Department upon completing an MSc. (Environmental Management) at NUS in 2011. She has spent the past decade in sustainability across investing, advisory and corporate sustainability. Edris also sits on the board of the Asia Investor Group on Climate Change (AIGCC) and the editorial panel for ESG Clarity Asia.

Hardik Shah, CFA, has built GMO's ESG capability across investment product areas and asset classes. His contributions include creation of proprietary country and company ESG scores and supporting ESG integration and engagement. He participated in CFA Institute's ESG working group which developed Global ESG Disclosure Standards for Investment Products and subsequently has been a member of its ESG verification subcommittee. Previously, Hardik conducted ESG research at Sustainalytics and MSCI, and was also a climate change consultant with EY. Hardik holds FSA credential by SASB, SCR credential by GARP, and the CFA charter.

Kanol Pal, CFA, Senior Advisor, Responsible Investments, BNP Paribas Wealth Management, will share his experience on how wealth managers integrate ESG in their product offerings. He has more than 30 years' experience in financial markets and has worked both in Europe and Singapore. Kanol is a graduate of the ESSEC business school and a CFA charterholder. He has a postgraduate certificate in Business Sustainability from Cambridge Institute for Sustainability Leadership (CISL) and the CFA ESG Investing certificate. He is currently a Board member of CFA Singapore and a member of CFA Institute ESG Technical committee.

IBF-FTS Enhanced Funding Support

This programme is approved for listing on the Financial Training Scheme (FTS) Programme Directory and is eligible for FTS claims subject to all eligibility criteria being met. Please note that in no way does this represent an endorsement of the quality of the training provider and programme. Participants are advised to assess the suitability of the programme and its relevance to participants' business activities or job roles.

This scheme is only eligible for only company-sponsored (Financial Institutions and eligible FinTech Firms) participants who are Singapore Citizens or Singapore Permanent Residents, physically based in Singapore and who have successfully completed the FTS programme.

For IBF recognised courses commencing between 1 January 2022 to 30 June 2022, the enhanced subsidies will cover up to 80% co-funding of training cost. However, Singapore Citizens aged 40 years old and above will be eligible for 90% co-funding of direct training costs, subject to a cap of S$2,000 per candidate per programme subject to all eligibility criteria being met.

Please refer to www.ibf.org.sg for more information.

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