

## **Certificate in ESG Investing Adds to the Skills Landscape in Investment Management**

Global certificate awarded by CFA Institute is helping the profession navigate shifting client demands for sustainable investments

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**HONG KONG SAR, CHINA, 25 OCTOBER 2021** — CFA Institute, the global association of investment professionals, has seen more than 11,500 global registrations for its [Certificate in ESG Investing](#) since inception two years ago, signaling a change in skillsets required in a fast-changing world of sustainable investment management.

Most candidates have come from the UK, where the Certificate was first offered, followed by the US, Switzerland, France, Hong Kong SAR and Singapore with interest growing throughout the globe. Financial institutions such as HSBC Wealth and Personal Banking, AXA Investment Managers, Aegon Asset Management, amongst others have been some of the largest employers of these candidates as these firms take steps to arm their investment professionals with a solid understanding of ESG investing.

**Mary Leung, Head, Advocacy, Asia Pacific at CFA Institute** comments:

“Against a backdrop of increasing client demand for ESG expertise, it is imperative for investment professionals to understand this subject matter. The Certificate in ESG Investing offers a broad foundation of knowledge to help portfolio managers, analysts and sales teams integrate ESG considerations into products, policies and client conversations. As we approach COP26, CFA Institute sees a clear role that the finance sector can play in integrating environmental, social and governance factors into investment portfolios. We continue to advocate for the provision of clear and comparable data from both corporates and fund managers, and for the need to build skillsets to understand and evaluate this data. The industry requires more well-equipped financial professionals to respond to the challenges facing society.”

**Jan-Marc Fergg, Global Head of Wealth Products, ESG & Mutual Funds at HSBC Global Private Banking and Wealth** comments:

“At HSBC Global Private Banking and Wealth, we see a clear trend emerging from our clients. Many seek investments that support the global fight against climate change, and

investments that are more broadly aligned with ESG principles. The CFA Institute Certificate in ESG Investing seeks to upskill relationship managers and investment counsellors as they meet client demands. The broad-based curriculum provides a solid foundation in understanding these concepts while also instilling an ability to sift through disclosures quickly and effectively.”

The Certificate, which was first launched by CFA Society of the United Kingdom, is now under the auspices of CFA Institute and available to candidates in most markets globally. The Certificate is also now available for investment firms to make bulk registrations for their employees, making it more convenient and practical for both companies and individuals.

In the run-up to COP26, CFA Institute is continuing to raise awareness for the need to upskill investment professionals in order to meet client demand and advocate for clear and consistent data in order for the sector to play its part in the transition to a more sustainable world.

During the week of COP26, CFA Institute has partnered with the City of London Corporation and Green Finance Institute, and will host a panel discussion on *Skills, Capacity and Data* at the [Green Horizon Summit](#) on Finance Day, 3 November. Panelists will include **Dr Ben Caldecott**, Director, Oxford Sustainable Finance Programme, and Lombard Odier Associate Professor and Senior Research Fellow; **Sarah Gordon**, Chief Executive of Impact Investing Institute; and **Will Goodhart**, Chief Executive of CFA Society of the UK. CFA Institute President and CEO **Margaret Franklin**, CFA, will also host a fireside chat with **Kate Hampton**, CEO of Children’s Investment Fund Foundation on 2 November. To register your interest, please visit: [www.greenhorizonsummit.com](http://www.greenhorizonsummit.com)

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### **About CFA Institute**

CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organization is a champion of ethical behavior in investment markets and a respected source of knowledge in the global financial community. Our aim is to create an environment where investors’ interests come first, markets function at their best, and economies grow. There are more than 175,000 CFA charterholders worldwide in 160 markets. CFA Institute has nine offices worldwide and there are 160 local societies. For more information, visit [www.cfainstitute.org](http://www.cfainstitute.org) or follow us on [Linkedin](#) and Twitter at [@CFAINstitute](#).

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