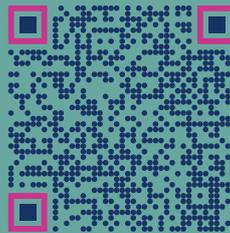


# CFA ESG

## Environmental Social & Governance

For those who have chosen  
not to be just "*begreeners*"  
but financial leaders.



Giving you the keys  
to financing for tomorrow,  
internationally recognised,  
the most sustainable  
response to meet  
your customers' needs.

Find out all the details about the course  
programme by scanning the QR code above  
or by going to our website at [win.isfb.ch/cfa-esg](http://win.isfb.ch/cfa-esg)



- ✔ A network of partners of over **50 banks and financial companies**
- ✔ **Services customised for your needs**: skills audit, certification, professional virtual classes, bespoke interventions to suit your business...
- ✔ **Over 150 expert trainers** specialised in their fields of interest and active in the world of banking and finance
- ✔ Only accredited service provider in French-speaking Switzerland licensed to deliver the **SAQ CWMA** certification process
- ✔ As a benchmark provider **for over 35 years**, the ISFB can offer certified training programmes highly rated by those who have completed them for their quality and impact (**5.5/6.0** on average)

# Challenges & Background

The mounting influence of institutional investors, sweeping generational changes or pressures being exerted by public opinion and regulators are all factors that will make incorporating sustainable investing into portfolios the major challenge in the decade ahead.

**This course leading to a professional qualification acknowledged worldwide** seeks to provide anyone involved in investing (financial advisors, client relationship, portfolio and fund managers, financial analysts) with the essential skillset to enable them to cope confidently and successfully with this daunting challenge.

The circular economy, biodiversity, climate change, mobility, decarbonisation, socio-economic inclusion: these are just a few of the many challenges facing our planet and for which we have to find innovative and efficient solutions.

By combining economic profitability with social, environmental and governing responsibility, sustainable investing is shaping up to be one of the most promising solutions to hand. In the not too distant past, sustainable investing had often been pigeonholed under the heading of "niche investments". But today interest in it has been expanding fast to pass the all-important threshold of significant critical mass.

How can sustainable investing be embedded into investment strategy? How can its impact be measured or quantified? How can investors' preferences be taken into consideration? How can financial returns and ESG impact be effectively combined?

By 2025, one-third of assets under management are likely to be being managed using strategies incorporating sustainability, impact investing or ESG criteria.

Source : Swiss Sustainable Finance



73%

of banks are already (or will, in the near term, be) taking ESG criteria into account during the decision-making process when granting loans to their business customers.

Source : EY

## AIMS OF THE TRAINING COURSE

After completing the training programme, participants will:

- Have an understanding of the challenges, eco-system and landscape of sustainable investing
- Have an understanding of systemic relationships, tangible impacts, megatrends and ESG analytical approaches at country, sector and/or corporate levels
- Have an understanding of aspects relating to ESG analysis, assessment and integration
- Be capable of analysing and assessing the influence of ESG factors on company valuations or how securities perform
- Be able to apply a variety of approaches to ESG analysis and integration across a multi-asset class portfolio
- Be fully conversant with how to deal with aspects related to investment mandates, portfolio analysis and client reporting.

## Modules & course length

Introduction to ESG & markets	3h
Extra-financial factors: governance & engagement / stewardship	3h
Extra-financial factors: environmental & social	3h
ESG analysis - Part I	3h
ESG analysis - Part II	2h
ESG portfolio construction	3h
Investment mandates & portfolio analytics	3h

## TARGET AUDIENCE & COURSE REQUIREMENTS

This training course is geared primarily towards those involved in the world of banking and finance (asset/wealth management, insurance, investment funds, etc.), who already have solid foundations in the area of investing and investments. The programme will be of particular relevance and usefulness to those involved most closely in key stages of the investment process, such as investment and financial advisors, portfolio managers, risk officers, and product, sales and distribution managers. The course is given exclusively in English, so participants need to be fluent enough to understand and formulate answers for complex financial scenarios (indicative level of competence in English: minimum B2/C1).

"Training delivered by expert practitioners working actively, often at senior levels, in the various areas of sustainable investing."

## A STATE-OF-THE-ART COURSE

Switzerland, as a beacon in the world of sustainable investing, has a fertile ecosystem comprising many leading figures in their fields of expertise as well as professional bodies, government agencies and NGOs concerned with sustainable investing. Switzerland's financial marketplace has adopted, as one of the cornerstones of its current strategy, the principles and concepts of sustainable investing, backed by the development of an array of bespoke products.

## A COMPREHENSIVE COURSE

Selection of factors, analytics, impact metrics, portfolio construction, monitoring and analysis, external reporting: the course content covers all crucial features of the investment value chain. At each point of contact and juncture, all aspects related to sustainability and its impact, coupled with implications as regards returns and risks, are studied, so that this two-pronged profitability/sustainability strategy can be properly integrated and balanced.

## AN APPLIED COURSE

The course will provide participants with the key analytics, suggestions for further investigation, practical tools and guidance on best practice that are applicable with immediate effect regardless of whichever area participants are working in. Over and beyond its comprehensive learning modules, reinforced with relevant examples and case studies, the programme also provides practice questions for revisiting topics and a pre-exam revision session.

## RECOGNISED WORLDWIDE

Developed originally by CFA Society UK and administered and awarded under the aegis of the prestigious CFA Institute, the benchmark body in the world of financial analysis training (over 165,000 qualified members in over 15 countries), this training course meets the most rigorous standards, with the final qualification recognised around the globe. These courses are provided by the ISFB, a benchmark provider of professional banking, financial and investment training and courses for over 35 years and a major player Europe-wide (2,500 clients a year, 150 training practitioners, approval rating of 5.52/6.00 average over 5 years).

## SUPPORT & EXAMINATION

Applicants who sign up for this course will have access to a comprehensive study kit, including, in addition to live teaching sessions, course material, practical explanatory videos and practice questions to reinforce knowledge. Each course participant can enter for the examination as an individual on a scheduled date offered by the licensed exam centres. The exam comprises 100 multiple-choice questions (MCQs). Examinees will have 140 minutes to complete the exam.

"(...) awarded under the aegis of the prestigious CFA Institute, the benchmark body in the world of financial analysis training (...), this training course meets the most rigorous standards, with the final qualification recognised around the globe."



**CFA Institute**  
Certificate in ESG Investing

**For further information :**  
ISFB | Institut Supérieur de Formation Bancaire  
Route des Jeunes 12, 1212 Geneva  
Switzerland  
+41 22 827 30 09

**Course fee for members :**  
**CHF 2,190.00**





- ⊕ Based on **realities on the ground** and in the profession, and geared to providing solutions for clients
- ⊕ Small staff and **personalised support**
- ⊕ Focused on **professional applications and impact**
- ⊕ **International** certification

