



WHAT DOES ESG MEAN FOR INVESTING?

The rise of ESG

CFA UK recognises the importance of equipping today's investment professionals with the knowledge and skills necessary to apply ESG factors in their day-to-day roles.

ESG continues to establish itself as a pillar of mainstream investing and we are developing a new qualification that fills this skills gap.

We are working with practitioners from leading firms to ensure that our new qualification will meet employers' and learners' needs for the future.



CFA Society
United Kingdom

www.cfauk.org

Certificate in ESG Investing (CFA UK Level 4 Certificate in ESG Investing)

Level 4

A modern and progressive qualification, the CFA UK Certificate in ESG Investing has been developed to deliver the knowledge and skills required by investment professionals to integrate ESG factors into the investment process.

Who is it for?

Designed for practitioners working in investment roles who want to learn how to analyse and integrate material ESG factors. It is also suitable for anyone working in sales & distribution, wealth management, product development, financial advice, consulting, risk and anyone looking to improve their understanding of ESG issues. The skills learned will be equally applicable to all asset classes.

Entry criteria

There are no formal entry criteria for this qualification, but it is strongly recommended that candidates have a solid grounding in the investment process achieved via formal qualification or experience.

Supported study

Bite-size, self-paced study programme supported by a dedicated training manual. Recommended study time is 130 hours.

Syllabus coverage

- The ESG market
- Governance factors
- Environmental factors
- Social factors
- ESG Analysis, Valuation and Integration
- Engagement and Stewardship
- ESG Integrated Portfolio Construction and Management
- Investment Mandates, Portfolio Analytics and Client Reporting

How it will benefit you

- Gain a unique and practical qualification
- Improve your competitive career advantage
- CFA UK qualifications are recognised by leading firms
- Develop the skills and competencies to fulfil both your fiduciary responsibilities and your firm's responsible investment mandates
- Successful completion can lead to the Diploma in Investment Management (ESG) for existing IMC holders.

Find out more about CFA UK's new ESG qualification and register your interest online www.cfauk.org/esg

More information



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