SUSTAINABLE INVESTMENT MANAGEMENT

IBF Standards - Private Banking and Wealth Management

4 IBF-STS TRAINING HOURS

For registration of public scheduled session, click here.
To organize a tailored session for your organization, please contact us at email@salmonthrust.com

In recent years, sustainable investing has witnessed increasing interest from investors, especially from an environmental, social and governance (ESG) perspective. Investors, both retail and institutional, are increasingly looking for Sustainable or ESG funds or investment opportunities that offer Sustainable/ESG factors, which potentially could enhance the value of a fund's performance while improving their investments' ESG performance.

This course reviews the key motivations behind the increased awareness of incorporating sustainable investment/ESG investing considerations in the investing process as well as the types of approaches to Sustainable/ESG investing. The role of ESG in the investment process will also be highlighted and participants will be introduced to the methods to evaluate these ESG research and ratings. In addition, the risks and challenges inherent in the ESG investing process will be discussed in the context of their feasibility when applied to asset classes and alternative investment, and in the banks' (or firms') engagement with their clients or investors when ESG factors are incorporated into their communication plans based on investors'/clients' risk appetites and requirements.

TARGET AUDIENCE

- Private bankers in their advisory roles
- ARMs
- RMs
- Account Managers of financial institutions

LEARNING OUTCOMES

- Understand the driving forces and motivation for Sustainable Investing in the investment landscape
- Be familiar with the types of approaches to Sustainable Investing and the universe of the sustainable investing asset classes
- Understand the sustainable issues that Sustainable Investing seeks to address and their role in the investment processes and determining its relevance and feasibility to the clients' and organization's needs including identifying the appropriate sustainable investment concepts that can be applied together, and which may be contradictory
- Aware of the research on and support the inclusion of sustainability factors in the portfolio construction process
- Understand the opportunities, benefits and challenges of Sustainable Investing including new and developing trends
- Aware of the leading global and regional sustainable investment initiatives, coalitions and pledges

COURSE OUTLINE

Prologue: Motivation for Sustainable investing
Definition of Sustainable/ESG Investing
Sustainability Issues

1. Key sustainable investment strategies or investment approaches and governance practices
- ESG & Sustainable Investing (RI)
- Ethical & Negative Exclusions
- Positive Inclusionary
- Impact Investing
- Governance Practices

2. Sustainable asset classes universe
- Equities
- Fixed Income
- Liquid Alternatives
- ESG Structured Products
- Illiquid Alternatives/High Impact Strategies

3. Approaches to take into account sustainable factors in investment process
- Sustainable/ESG Factors in Investment Considerations
- Sustainable Investing Classification
- The Spectrum of Capital in ESG Investing
- ESG Considerations in the Investment Decision Making Process

4. Sustainable investment trends including new approaches and challenges
- Sustainable Investment Trends
- Trends in the US
- Incorporating Climate-related Components
- Lifecycle View of the Investment Process

5. Sustainable investment principles and best practices
- Advancement of Sustainable Finance Frameworks
- Lessons from EU: Sustainable Finance
- UNPRI: Principles for Responsible Investment
- Implementing the 6 Principles

6. Leading global and regional sustainable investment initiatives, coalitions and pledges
- Best Practice Guidelines & Regulatory Reporting Evolution
- Global & Regional Sustainable Investment Initiatives, Coalitions & Pledges
- Q&A

Assessment - MCQ

IBF STANDARDS

This course is designed to meet the following Technical Skills and Competencies (TSCs) in Skills Framework for Financial Services:

The Institute of Banking & Finance Singapore

This programme has been accredited by The Institute of Banking and Finance (IBF) under the IBF Standards.

Industry Segment : Private Banking and Wealth Management
Job Role : ARMs, RMs and Team Leads

Technical Skills and Competencies (TSCs) and Proficiency Level
J10. Sustainable Investment Management (Level 3)

IBF-STS

This programme has been accredited under the IBF Standards, and is eligible for funding under the IBF Standards Training Scheme (IBF-STS), subject to all eligibility criteria being met. Candidates are advised to assess the suitability of the programme and its relevance to participants' business activities or job roles.

Find out more on www.ibf.org.sg

ABOUT IBF CERTIFICATION

Participants are encouraged to access the IBF MySkills Portfolio to track their training progress and skills acquisition against the Skills Framework for Financial Services. You can apply for IBF Certification after fulfilling the required number of Technical Skills and Competencies (TSCs) for the selected job role.

Find out more about IBF certification and the application process here.

ABOUT THE IBF STANDARDS

The IBF Standards are a set of competency standards for financial skills. These Standards are developed in partnership with industry leaders and provide a professional development and skills roadmap for financial sector practitioners to excel in their respective job roles. They currently cover 12 industry segments in the financial sector.

ABOUT THE INSTITUTE OF BANKING AND FINANCE SINGAPORE

The Institute of Banking and Finance Singapore (IBF) is the national accreditation and certification agency for financial industry competency in Singapore under the IBF Standards. Find out more on www.ibf.org.sg

ABOUT SALMON THRUST

Founded in 2004, Salmon Thrust is committed to delivering real-world banking and financial training to professionals working in banks, corporates, government agencies, and other financial institutions.

Based in Singapore, we offer our clients in the region a broad range of up-to-date financial topics, delivered via classroom training and e-learning. Our courses range from foundational programmes for new entrants, right through to the most complex and current topics in the industry.

At Salmon Thrust, we are attentive to our clients' diverse learning needs. We identify relevant courses to bridge the learning and skill gaps, empowering our clients to make better decisions and bring real value to both their customers and organisations.

T (65) 6323 0768 **E** email@salmonthrust.com