

Certificate in ESG Investing

Environmental, Social, and Governance

Why Should You Earn the Certificate in ESG Investing?

- ESG certification shows expertise in analyzing environmental, social, and governance factors in investment analysis.
- Designed for practitioners to integrate ESG factors into their roles.
- Suitable for various investment positions.
- Improves understanding of ESG issues.



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Course Introduction

- Environmental, social, and governance (ESG) investing is a rapidly growing practice within the institutional investment field that aims to account for non-financial factors when analyzing the overall value of an organization or investment. Investors are incorporating ESG analyses into the investment process to gain a fuller understanding of the companies in which they invest.
- In 2022, CFA Institute began offering the Certificate in ESG Investing as a global credential within its suite of prestigious certifications and designations.

Exam Structure

Exam Scheduling



Once you enroll, you have 6 months to schedule and sit for your exam.

Number of Questions



Exam consists of 100 multiple choice questions.

Testing Time



You will have 2 hours and 20 minutes to complete the computer-based exam.

Topics Weights

Curriculum Topic	Topic Weight
Introduction to ESG Investing	7%
The ESG Market	6%
Environmental Factors	12%
Social Factors	12%
Governance Factors	11%
Engagement and Stewardship	9%
ESG Analysis, Valuation and Integration	21%
Integrated Portfolio Construction and Management	13%
Investment Mandates, Portfolio Analytics, and Client Reporting	9%
	100%

How To Prepare For Exam

With our Schweser ESG Certification Prep Package, you'll receive an efficient, effective study plan that is exam-focused and results-driven. You'll prepare with top-of-the-line instructors, study materials, and delivery platforms that are backed by decades of proven learning science.

You get a six-month unlimited access to the 2024 curriculum:



ONLINE INSTRUCTION

- **15+ hours** of OnDemand instruction from our expert instructors



REVIEW & PRACTICE

- **SchweserPro™ QBank** containing hundreds of exam-like questions
- Two 100-question, realistic **Mock Exams** with Exam Sim technology



LEARNING SUPPORT

- **Getting Started Guide** to start your exam prep journey on the right foot
- Access to the **Kaplan Schweser Community** forum to connect with candidates and ESG experts
- **InstructorLink** to engage with our team of instructors

The Schweser PassProtection™

To be eligible for a free ESG Certification Prep Package for your next exam sitting*.



You must meet the following criteria:

- Have previously purchased the Schweser ESG Certification Prep Package.
- Are registered to retake your ESG certification exam.

In order to enjoy the Schweser PassProtection™, you must attach the following documents:

- Exam fail notice for same level / Proof of approval of Deferral from CFA Institute
- New exam registration notice
- Schweser PassProtection™ Application Form

*Gain access of online study materials for another sitting within the same year or receive new package if you are retaking the exam in the next curriculum year.

Course Fee

HK\$ **3,000**



What is ESG?

- ESG investing is a framework to help investment firms better understand risks and opportunities associated with a particular company or fund. The framework consists of many ESG factors and uses multiple strategies to make financial projections and assist institutional investment decisions.

ESG factors used in ESG Investing and analysis include:

Environmental

- Deforestation
- Pollution
- Green Energy
- Waste Management
- Water Usage

Social

- Employee gender and diversity
- Data privacy and security
- Community relations
- Company sexual harassment policies
- Workers' rights

Governance

- Board composition
- Corruption
- Political activities
- Executive pay
- Lawsuits
- Lobbying

Certificate in ESG Investing

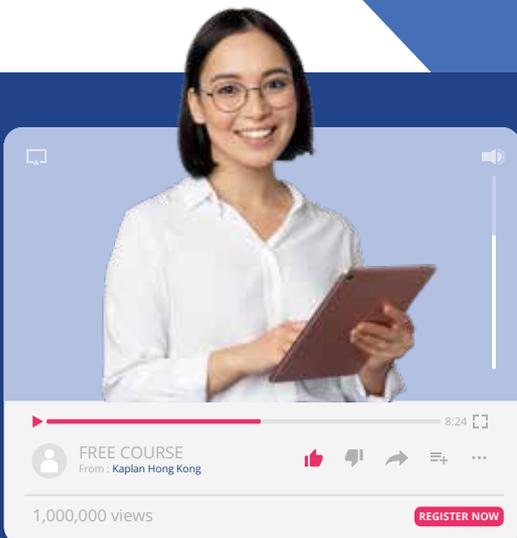
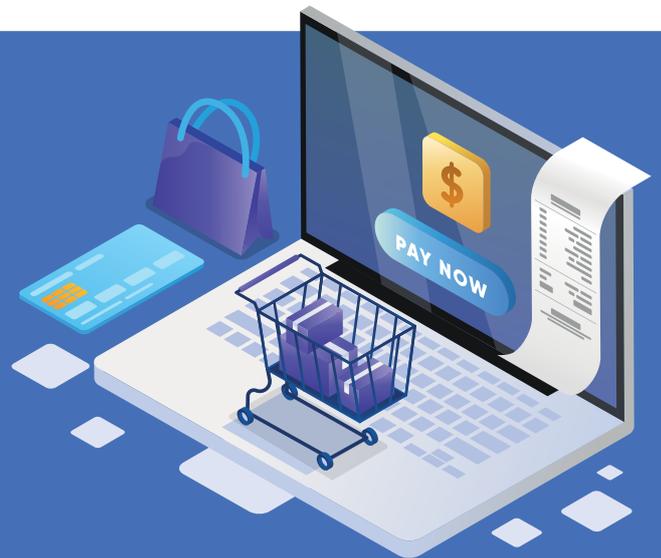
- An ESG certificate can benefit anyone who works in operations, strategy, or management within the institutional investment field.
- An ESG certification can be especially useful for CFA Charterholders, CAIA Charterholders, and Certified FRMs who would like to move into a more senior position and accelerate their careers. Even sales and distribution, wealth managers, product developers, financial advisors, consultants, or risk managers can benefit from improving their understanding of ESG issues.
- Undergraduate and graduate students who are interested in pursuing a career in the investment industry may also benefit from earning an ESG certificate.



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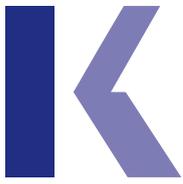
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Certificate in ESG Investing

(Refer to 2024 Curriculum)

Enrollment Form

Certificate in ESG Investing

please tick choice of solutions / products

Schweser ESG Certification Prep Package

	Price
Retail	<input type="checkbox"/> \$3,000

Total Payment

\$

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(Name on HKID or Passport)

Forename* | _____ |

HKID/Passport No.* | _____ | Date of Birth | _____ | (DD/MM/YY)
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