

#ESG24

Chasing Sustainability – Asset Owners’ Paradox

ESG CONFERENCE GENEVA 2024

FAIRMONT GRAND HOTEL GENEVA | 24 APRIL 2024



CFA Society
Switzerland

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#ESG24 GENEVA

Chasing Sustainability – Asset Owners' Paradox

The flagship Annual ESG Investing Conference of CFA Society Switzerland focuses this year on the opportunities and challenges of ESG investing from the asset owners' perspective. Under the motto "Chasing Sustainability - Asset Owners' Paradox", the Conference features a great line-up of keynote speeches, expert panels and workshops led by industry practitioners, academia experts, asset owners, industry associations and policy makers on burning key topics, such as the integration of ESG considerations in the asset allocation for pension funds, achieving the real impact from engagement and active stewardship, transparent and pragmatic ESG investment reporting, newest academic research on ESG metrics, ratings and investment performance, as well as the current regulation and self-regulation initiatives in ESG investing in Switzerland.

The Conference underscores the imperative role of asset owners in shaping a more sustainable future through responsible investment practices and is a must-attend event for asset owners and investment professionals seeking to navigate the evolving landscape of sustainable investing. Due to the overwhelming positive feedback to our past ESG Investing Conferences, this year our ESG Conference welcomes you both in Zurich and Geneva.

CFA Society Switzerland members can register PL credits for their participation using the online tracking tool. (Note: you will need to log in with your CFA Institute ID to access it).

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Agenda 24 April 2024

08:30–09:00 **Registration**
Welcome Coffee

09:00–09:05 **Welcome Remarks**

Mirjana Wojtal, PhD, CEO, CFA Society Switzerland
Dimitri Senik, CFA, Chair, ESG Conference 2024

09:05–09:35 **Opening Keynote**

Sandrine Salerno, Former Mayor of Geneva

09:35–10:15 **Drawing Up the Bill: Is ESG Related to
Stock Returns Around the World?**

Prof. Dr. Philipp Krüger, Professor of Finance, the University of Geneva

10:15–10:45 **Networking Break**
Morning Coffee

10:45–11:30 **Breakout Session by Robeco: Building Portfolios
with Engagement for Impact and Returns**

David Thomas, Senior Portfolio Manager Biodiversity Equities Strategy
Clare Ahlborn, Engagement Specialist

11:30–12:15 **ESG Investing: Clash of Regulations and Self-regulation?**

Panel Discussion
Moderator: Dimitri Senik, CFA
Panelists:
Aurélia Fähr, Senior Sustainability Expert, AMAS
Martin Roth, CEO, Manor Pension Fund and President, ASIP
Katja Brunner, Director Legal and Regulatory, Swiss Sustainable Finance

12:15–13:45 **Networking Lunch**

13:45-14:30	Practical Challenges with Implementation of ASIP ESG Investment Reporting Standards and ASIP ESG Guidelines for Pension Funds
	<p>Panel Discussion Moderator: Rachel Whittaker, CFA Panelists: Martin Roth, CEO, Manor Pension Fund and President, ASIP Pascal Frei, Partner, PPCmetrics Dr. Lars Kaiser, Head Group Sustainability, VP Bank Angela de Wolff, Managing Partner, Conser</p>
14:30-15:15	Engagement and Active Stewardship as Impactful Instruments for Asset Owners
	<p>Panel Discussion Moderator: Ekaterina Chubarova, CFA Panelists: Vincent Kaufmann, CEO, Ethos Foundation and Ethos Services Vicky Sins, Decarbonisation and Energy Transformation Lead, World Benchmarking Alliance (WBA) Maria Cuevas, Investor Relations Director & ESG Head, Novartis</p>
15:15-16:15	Networking Break Afternoon Coffee
15:45-16:25	Integration of ESG Considerations into the Asset Allocation of Asset Owners
	<p>Panel Discussion Moderator: Pierre Cardon, CFA, Senior Strategist within the Banking Department, Bank for International Settlements (BIS) Panelists: Grégoire Haenni, CIO, Caisse de prévoyance de l'Etat de Genève Fiona Frick, Founding Partner, Circe Invest</p>
16:25-16:55	Catalyzing Change: Net Zero Strategies, Metrics Evolution, and Regulatory Pathways – Bridging the Gap from Voluntary Initiatives to Policy Integration
	<p>Jesica Andrews, Head of Climate Accountability, United Nations Environment Programme Finance Initiative</p>
16:55-17:00	Closing Remarks
	<p>Mirjana Wojtal, PhD, CEO, CFA Society Switzerland Dimitri Senik, CFA, Chair, ESG Conference 2024</p>
17:00-18:00	Apéro Riche Farewell

CONFERENCE ORGANIZATION

The mission of CFA Society Switzerland is to lead the investment profession in Switzerland by fostering the highest standards of integrity, knowledge and professionalism in the investment industry, for the ultimate benefit of society.

It represents more than 3,400 members to promote the values represented by the CFA® designation, provide continuing education, support CFA candidates, and strengthen the network between members.

CFA Society Switzerland conferences are created by Society volunteers with domain expertise with the goal of providing independent, relevant and credible platforms of exchange and education at the cutting edge of knowledge.

Membership in CFA Society Switzerland and CFA Institute is open to all CFA Charterholders and candidates in the CFA programme as well as finance professionals with at least one year of professional experience who share the Code of Ethics and Standards of Professional Conduct of CFA Institute.

www.cfasocietyswitzerland.org

#ESG24 AGENDA TEAM

Dimitri Senik, CFA, PwC, Chair of the ESG Committee of CFA Society Switzerland

Andrea Biscia, CFA, Decalia

Dominique Bruggmann, CFA, EY

Ekaterina Chubarova, CFA, International Labour Organization

Margaret Gouthier, CFA Society Switzerland

Michael Haene, CFA, FRM, City of Zurich Pension Fund

Aurélie Madé, CFA, FRM, Partners Group

Sara Razmpa, CFA, Unigestion

Zina Sanyoura, CFA, International Committee Red Cross

Severin Scrugli, Bank J. Safra Sarasin

Dr. Stephan Skaanes, CFA, FRM, PPCmetrics

Ralf Stark, CFA, Swiss Re

Rachel Whittaker, CFA, Robeco

Claudia Zimmermann, CFA, C-Advisory

REGISTRATION

To register and purchase tickets, members and guests must register and log in with a CFA Institute ID number.

TICKET PRICE

- **Members of CFA Society Switzerland: CHF 175**
(Early bird CHF 125; valid until 24 March 2024).
- **CFA Candidates: CHF 275**
(Early bird CHF 225; valid until 24 March 2024); If you are a Candidate Member of CFA Society Switzerland, please contact us for the discount code.
- **Non-members: CHF 275**
(Early bird CHF 225; valid until 24 March 2024).

Terms and Conditions: Full refund – cancellation is made by the participant online and is possible up to 10 working days before the conference. For media inquiries and press passes, please contact events@cfasocietyswitzerland.org.

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<https://cfasocietyswitzerland.org/events/event-calendar/esg-conference-geneva-2024-chasing-sustainability-asset-owners-paradox/>

Certificate in ESG Investing

THE 2024 CFA INSTITUTE CERTIFICATE

Who is the certificate for: Analysts, portfolio managers, c-suite executives or anyone with a foundation in investment management interested in Mastering ESG Investing.

Exam Duration:
2h 20min

Cost:
\$865 USD

Length:
100 Multiple Choice Questions

Why choose the 2024 CFA Institute Certificate in ESG Investing?

Being able to incorporate environmental, social, and governance (ESG) factors into investment decisions and beyond is fast becoming essential. Our Certificate in ESG Investing provides the building blocks to meet this growing demand.

The certificate has been updated for 2024 to help candidates integrate the latest information on ESG factors into the investment process to help meet the needs of your clients.

Become the in-house expert on ESG at your firm and earn an internationally-recognized certificate that demonstrates your mastery.

66% of participants use their knowledge immediately

Earning the CFA Institute Certificate in ESG Investing is not just a step in the right direction for the investment industry. It can be extremely beneficial to your career.

With a much-respected foundation in ESG skills and knowledge, you can expand your opportunities in the industry by staying on top of the latest demands by investors. You'll have the competency and credibility to provide ESG recommendations to clients to meet the needs of new mindsets and strategies rapidly changing the world of investing.

"If you're working in the ESG space, or even if you're not working in the ESG space, I think it would be a good program to get a crash course on ESG and how to think about it and why it matters."

- Bohdan C, ESG Investment Product Analyst

"I cannot overemphasize the importance of the certificate and how it has helped me understand the very basic concepts in ESG." - Samuel A, Manager

"It doesn't matter what you are doing in your job - you transform into the expert of the company, even if you are not experts because of this change alone. There are a lot of things I don't know, but I'm in a better position to read about it and ask." - Jose I, Funding Desk Trader

Certificate in ESG Investing

THE 2024 CFA INSTITUTE CERTIFICATE

FAQ

Am I eligible for the certificate?

There are no formal entry criteria, but it is recommended that candidates have knowledge and grounding in the investment process. Please note there is a study commitment of 100 hours on average.

How do I take the exam?

You will have six months from registration to schedule and take your examination. You can take the exam at a Prometric test center, or through remote proctoring if available in your country.

What will I learn?

See the latest [syllabus here](#).

What will I receive once I register?

Registration includes the first exam sitting, two mock exams and access to online learning materials via a secure platform. This information will be provided to you upon confirmation of your registration.



Resources:

Click [here](#) to:

- Check out CFA Institute Views on ESG Investing
- Learn More about the Certificate in ESG Investing
- Register Now