

#ESG24

Chasing Sustainability – Asset Owners’ Paradox

ESG CONFERENCE ZURICH 2024

MARRIOTT HOTEL ZURICH | 15 MAY 2024



CFA Society
Switzerland

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#ESG24 ZURICH

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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#ESG24 ZURICH

Agenda 15 May 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 **Risks, Dependence, and Metrics
of Corporate Biodiversity Impact**

Prof. Dr. Judith Walls, University of St. Gallen

09:35-10:15 **Integration of ESG Considerations into
the Asset Allocation of Asset Owners**

Panel Discussion
Moderator: Pierre Cardon, CFA, Senior Strategist within the
Banking Department, Bank for International Settlements (BIS)
Panelists:
Diego Liechti, CIO, Nest Sammelstiftung
Fiona Frick, Founding Partner, Circe Invest
Dr. Ingeborg Schumacher-Hummel, Founder, Responsible Impact Investing

10:15-10:45 **Networking Break, Morning Coffee**

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

Dora Buckulčíková, Portfolio Manager
Danae Motta, Sustainability Research & Engagement Specialist

10:45-11:30 **Breakout Session by Zürcher Kantonalbank: Sustainable
Investment Products, How to Buy and How to Make**

Dr. Alexander Tobler, Head of Investment Architecture,
ZKB Investment Solutions - Buyer's view: How to design sustainable
investment solutions with best-in-class Asset Managers
Ruben Feldman, Deputy Head of ESG & Development,
ZKB Asset Management - Producer's view: How to construct
sustainable investment products

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

Panel Discussion
Moderator: Dimitri Senik, CFA
Panelists:
Adrian Schatzman, CEO, Asset Management Association Switzerland
(AMAS)
Jürg Tobler, Head of Investments, Pension Fund City of Zurich
Sabine Döbeli, CEO, Swiss Sustainable Finance (SSF)

12:15-13:45	Networking Lunch
13:45-14:30	<p>Breakout Session by Quaero Capital: Insights into Challenges and Prospects of Energy Transition Investments</p> <p>Sébastien Bourget, Managing Partner, Head of Infrastructure, Quaero Capital Antoine Turrettini, Investment Director, Quaero Capital</p>
14:30-15:15	<p>Practical Challenges with Implementation of ASIP ESG Investment Reporting Standards and ASIP ESG Guidelines for Pension Funds</p> <p>Panel Discussion Moderator: Rachel Whittaker, CFA Panelists: Jürg Tobler, Head of Investments, Pension Fund City of Zurich Dr. Lars Kaiser, Head Group Sustainability, VP Bank Luzius Neubert, Partner and Member of Management Board, PPCmetrics Thomas Tscherrig, Member of Executive Board, bmp</p>
15:15-15:45	Networking Break Afternoon Coffee
15:45-16:30	<p>Engagement and Active Stewardship as Impactful Instruments for Asset Owners</p> <p>Panel Discussion Moderator: Claudia Zimmermann, CFA Panelists: Vincent Kaufmann, CEO, Ethos Foundation and Ethos Services Prof. Vanina Farber, eia Professor of Social Innovation, Dean of the IMD EMBA program Antonio Hautle, Executive Director, UN Global Compact Network Switzerland & Liechtenstein</p>
16:30-16:55	<p>Self-regulation vs. Regulation of the Financial Sector – a Political Perspective</p> <p>Eric Nussbaumer, President of the Swiss National Council</p>
16:55-17:00	<p>Closing Remarks</p> <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 15 April 2024).
- **CFA Candidates: CHF 275**
(Early bird CHF 225; valid until 15 April 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 15 April 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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15 MAY 2024

<https://cfasocietyswitzerland.org/events/event-calendar/esg-conference-zurich-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