

## Invitation to CFA & SSF joint event: ESG Integration in Investment Management

**Date:** Thursday, 21 March 2019, 10:30-13:15 (followed by lunch)

**Location:** Geneva, Hotel Warwick, Rue de Lausanne 14

ESG practitioners use multiple acronyms, terms, and practices when they talk about ESG integration. A common definition often used by the industry for ESG integration is: *"the explicit and systematic inclusion of ESG factors in investment analysis and investment decisions."* But do all practitioners interpret this in the same way?

In order to help the industry reach a common understanding, CFA Institute and Principles for Responsible Investment (PRI) have created a best practice report ([Guidance and Case Studies for ESG Integration: Equities and Fixed Income](#)) and three regional reports to help investors understand how they can better integrate ESG factors into their equity, corporate bond, and sovereign debt portfolios. At this event, the results of this project will be presented. Join us to learn from the case studies included in the report and discuss the practical challenges of ESG integration with a panel of expert practitioners.

We look forward to your participation and further discussions.

10:15	Registration	
10:30	Welcome and Overview of the CFA Institute / PRI study project and presentation of EMEA regional report	<b>Christian Dreyer</b> CFA, CEO, CFA Society Switzerland <b>Matt Orsagh</b> CFA, Director Capital Markets Policy, CFA Institute
11:05	Presentation of case study: Beyond Ratings – Sustainability Integration in Fixed Income	<b>Christopher Greenwald</b> , Head of Research Sustainable and Impact Investing, UBS Asset Management
11:35	Panel discussion: Practical challenges of integrating ESG in asset management	<b>Eric Borremans</b> , Head of ESG, Pictet Asset Management <b>Christopher Greenwald</b> , Head of Research Sustainable and Impact Investing, UBS Asset Management <b>Nicolas Jamet</b> , Senior Quantitative Analyst, RAM Active Investments SA Moderated by: <b>Kelly Hess</b> , Senior Project Manager, SSF
12:30	Networking lunch	

This Continuing Education event is good for 2 CE credits SER. Members of Swiss Sustainable Finance and CFA Institute / CFA Society Switzerland are admitted at the member rate, whereas guests are welcome at the guest rate.

Sign up for this event on the [CFA website](#). **The registration deadline is 15 March 2019.** The event will be held in English.

**About CFA Institute**

CFA Institute is a global community of more than 150,000 investment professionals working to build an investment industry where investors' interests come first, financial markets function at their best, and economies grow.

**About Swiss Sustainable Finance (SSF)**

As the Swiss association on sustainable finance we strengthen the position of Switzerland in the global marketplace for sustainable finance by informing, educating and catalysing growth. The association, founded in 2014, has representation in Zurich, Geneva and Lugano. Currently SSF unites 113 members and network partners from financial service providers, investors, universities and business schools, public sector entities and other interested organisations. An overview of Swiss Sustainable Finance's current members and network partners can be found [here](#).