


Sustainable-Investing Exam Course - Sustainable-Investing Valid Test Syllabus



Sustainable Investing Syllabus

Sustainable Investing will equip you with the insights, frameworks, and skills to evaluate environmental, social, and governance (ESG) factors and measure and manage impact resulting from investments. You will explore the evolving sustainable investing landscape, understand how to incorporate ESG factors into investment decisions, gain insights into climate risk and how to incorporate those implications into financial models, and develop your own perspective on the interaction of investing and impact.

| Modules | Case Studies | Takeaways | Key Exercises |
|---|--|---|--|
| Module 1 Overview of Sustainable Investing | <ul style="list-style-type: none"> Morgan Stanley Goldman Sachs Omidyar Network | <ul style="list-style-type: none"> Understand key terminology Develop an understanding of the sustainable investing sector and its importance and viability | <ul style="list-style-type: none"> Categorize business model characteristics and environmental, social, and governance criteria Reflect on challenges and opportunities of sustainability strategies |
| Module 2 Public Equities | <ul style="list-style-type: none"> CalSTRS Generation Investment Management | <ul style="list-style-type: none"> Understand the role of ESG factors in public market investing Evaluate different approaches to incorporating ESG as an asset owner or manager Relate ESG-based investment strategies to risk and return | <ul style="list-style-type: none"> Evaluate the ESG performance of various companies Match ESG use cases to corresponding strategies Articulate divestment goals and theories of change |
| Module 3 Venture, Private Equity, and Sustainable Debt | <ul style="list-style-type: none"> DBL Partners Meridiam TPG: The Rise Fund | <ul style="list-style-type: none"> Identify sources of value-add in private impact investing Analyze how managers weigh financial and social returns, including understanding "impact washing" Develop an understanding of different types of sustainable debt | <ul style="list-style-type: none"> Analyze characteristics and assess performance of funds and fund managers |

For more information, visit online.hbs.edu/courses/sustainable-investing.
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The web-based Sustainable-Investing practice test can be taken via any operating system without the need to install additional software. Also, this Sustainable-Investing web-based practice exam is compatible with all browsers. Both CFA Institute Sustainable-Investing Practice Tests of Exams4Collection keep result of your attempts and assist you in fixing errors. Moreover, you can alter settings of these Sustainable-Investing practice exams to suit your learning requirements.

Some customers might worry that passing the exam is a time-consuming process. Now our Sustainable-Investing actual test guide can make you the whole relax down, with all the troubles left behind. Involving all types of questions in accordance with the real exam content, our Sustainable-Investing exam questions are compiled to meet all of your requirements. The comprehensive coverage would be beneficial for you to pass the exam. Only need to spend about 20-30 hours practicing our Sustainable-Investing study files can you be fully prepared for the exam. With deeply understand of core knowledge Sustainable-Investing actual test guide, you can overcome all the difficulties in the way. So our Sustainable-Investing exam questions would be an advisable choice for you.

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of Sustainable-Investing exam questions, you will be well- acquainted with the software and its related features. Also Sustainable-Investing exam comes with various self-assessment features like timed exam, randomization questions, and multiple questions types, test history and score etc. Which means it enables you to customize the question type and you may practice random questions in order to enhance your skills and expertise. You may keep attempting the same questions many a time also.

CFA Institute Sustainable-Investing Exam Syllabus Topics:

| Topic | Details |
|---------|--|
| Topic 1 | <ul style="list-style-type: none"> • Governance: This section assesses skills of Governance Analysts and Compliance Officers concerning governance structures. It covers key characteristics and models of governance, material impacts, diversity, equity, and inclusion considerations, and shareholder rights. |
| Topic 2 | <ul style="list-style-type: none"> • Social Factors: Focused on Social Analysts and Corporate Social Responsibility (CSR) Professionals, this domain reviews social factors impacting investments. It includes systemic relationships and material impacts related to labor practices, diversity, equity, inclusion, and social opportunities at multiple levels. |
| Topic 3 | <ul style="list-style-type: none"> • Introduction to ESG Investing: This section of the exam measures skills of Investment Analysts and Portfolio Managers and covers the foundational concepts of environmental, social, and governance (ESG) investing. It focuses on defining ESG investment, different responsible investment approaches, sustainability concepts, benefits and challenges of ESG integration, and key global initiatives in ESG. |
| Topic 4 | <ul style="list-style-type: none"> • Engagement and Stewardship: Designed for Asset Managers and Stewardship Professionals, this domain covers investor engagement strategies and stewardship principles. It highlights the purpose, importance, key principles, and practical application of engagement tactics within responsible investing frameworks. |
| Topic 5 | <ul style="list-style-type: none"> • The ESG Market: This domain targets Financial Analysts and Institutional Investors, examining the size, scope, relevance, and key drivers of the ESG market. It also discusses risks and opportunities within the ESG investment landscape, helping candidates understand market dynamics and trends. |
| Topic 6 | <ul style="list-style-type: none"> • Environmental Factors: This section measures skills of Environmental Analysts and Sustainability Specialists by exploring environmental issues such as climate change, resource management, biodiversity, and pollution. It covers systematic relationships, material impacts, and methodologies for environmental analysis at country, sector, and company levels. |

CFA Institute Sustainable Investing Certificate (CFA-SIC) Exam Sample Questions (Q715-Q720):

NEW QUESTION # 715

Suppose the average price-to-earnings (P/E) ratio for the financial industry is 10x. A financial institution with high ESG risk compared to its industry, is most likely assigned a fair value P/E ratio:

- A. higher than 10x
- B. of 10x
- C. lower than 10x

Answer: C

Explanation:

Price-to-Earnings (P/E) Ratio and ESG Risk:

The price-to-earnings (P/E) ratio is a valuation metric used to assess the relative value of a company's shares. A company with higher ESG risks is generally perceived as having higher operational and financial risks, which can negatively impact its valuation.

1. High ESG Risk Impact: A financial institution with high ESG risk compared to its industry peers is likely to be perceived as riskier.

Investors may demand a higher risk premium for holding such a company's shares, which can result in a lower valuation multiple.

2. Fair Value P/E Ratio: Given the average P/E ratio for the financial industry is 10x, a financial institution with higher ESG risks is most likely to be assigned a fair value P/E ratio lower than the industry average. This reflects the increased perceived risk and potential for future financial underperformance due to ESG-related issues.

Reference from CFA ESG Investing:

ESG Risk and Valuation: The CFA Institute discusses how ESG risks can impact a company's valuation by influencing investor

perceptions and risk assessments. Companies with higher ESG risks may trade at lower multiples due to the associated uncertainties and potential for adverse impacts on financial performance.

P/E Ratios and ESG Integration: Understanding the relationship between ESG risks and valuation multiples is essential for integrating ESG factors into investment analysis and valuation models.

In conclusion, a financial institution with high ESG risk compared to its industry is most likely assigned a fair value P/E ratio lower than 10x, making option A the verified answer.

NEW QUESTION # 716

Which of the following asset classes has the lowest degree of ESG integration?

- A. Sovereign debt
- B. Investment grade corporate debt
- C. Emerging markets corporate debt

Answer: A

Explanation:

Sovereign debt has the lowest degree of ESG integration compared to investment-grade corporate debt and emerging markets corporate debt. This is due to several factors:

Limited ESG Data: There is generally less ESG data available for sovereign issuers compared to corporate issuers. Sovereign ESG assessments rely on country-level indicators, which may not be as detailed or specific as corporate ESG disclosures.

Complexity of ESG Factors: The ESG factors affecting sovereign debt are more complex and broader in scope, encompassing issues like political stability, governance, human rights, and environmental policies.

This complexity makes it challenging to integrate ESG factors effectively.

Market Practices: The integration of ESG factors into sovereign debt investment processes is less advanced compared to corporate debt markets. While there is growing interest, the methodologies and frameworks for assessing sovereign ESG risks are still developing.

References:

MSCI ESG Ratings Methodology (2022) - Discusses the challenges and current state of ESG integration across different asset classes, highlighting the relative lag in sovereign debt.

ESG-Ratings-Methodology-Exec-Summary (2022) - Provides insights into the varying degrees of ESG integration in different asset classes and the factors contributing to these differences.

NEW QUESTION # 717

The goal of limiting global warming to 1.5 °C was first set out in the:

- A. Paris Agreement.
- B. Kyoto Protocol.
- C. Glasgow Climate Pact.

Answer: A

Explanation:

The Paris Agreement of 2015 was the first international accord to set the explicit goal of limiting global warming to 1.5 °C above pre-industrial levels. Prior agreements like the Kyoto Protocol focused on emissions reduction targets but did not establish this specific temperature goal. The Glasgow Climate Pact built on the Paris Agreement's framework but did not originate the 1.5 °C target.

NEW QUESTION # 718

Which of the following ESG investment approaches is most likely applicable when investing in sovereign debt?

- A. Collaborative engagement
- B. Active private engagement
- C. ESG tilting

Answer: C

Explanation:

ESG tilting is an investment approach applicable when investing in sovereign debt. It involves adjusting the weightings of sovereign

bonds in a portfolio based on ESG scores, thereby favoring countries with better ESG performance. This method aligns investment decisions with ESG criteria while maintaining diversification and managing risk within sovereign bond portfolios.

NEW QUESTION # 719

Which of the following statements about corporate governance is most accurate?

- A. Most markets lack an official corporate governance code
- **B. Corporate scandals have been a powerful driver for the development of corporate governance codes**
- C. The Sarbanes-Oxley Act was the world's first formal corporate governance code

Answer: B

Explanation:

The most accurate statement about corporate governance is that corporate scandals have been a powerful driver for the development of corporate governance codes.

Corporate scandals (C): High-profile corporate scandals, such as Enron and WorldCom, have exposed significant governance failures and have led to the development and strengthening of corporate governance codes around the world. These scandals highlight the need for robust governance frameworks to protect shareholders and ensure corporate accountability.

Lack of official corporate governance code (A): Most markets have developed official corporate governance codes to provide guidelines for good corporate practices.

Sarbanes-Oxley Act (B): The Sarbanes-Oxley Act, enacted in 2002 in the United States, was not the world's first formal corporate governance code, but it was one of the most influential, particularly in response to corporate scandals.

References:

CFA ESG Investing Principles

Historical development of corporate governance codes

NEW QUESTION # 720

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