#ESG22

NEW HORIZONS IN ESG

INVESTING AND TRANSPARENCY

ESG CONFERENCE 2022 ZURICH

KRAFTWERK, ZURICH | 19 MAY 2022

CFA Society Switzerland

New Horizons in ESG Investing and Transparency

Just over a few years the Environmental, Social and Governance (ESG) Investing has evolved from being a mere "niche" area occupied by enthusiasts into a widely-recognised, almost "mainstream" investment philosophy and become an integral element of a modern investment process.

Investors have recognized the importance of considering ESG factors in the investment evaluation and risk management and are increasingly expecting investment managers to provide solutions. Climate and environmental impact has become a significant additional metric in evaluating performance of investments. While bringing obvious benefits to the environment, society, capital markets and investors, ESG Investing has also unveiled various challenges, such as variety of ESG frameworks and codes, lack of standardization and transparency, "jungle" of investment approaches and products, high complexity of metrics and impact measures, fears of "greenwashing" and a "wave" of new regulations.

The investment industry – investment managers, asset owners and regulators – are all working hard to address those challenges by providing more transparency, security and effective investment solutions to investors, with various efforts being undertaken both an the global, regional and local level – Switzerland being no exception. It is a good time to take a moment and look at the current status of ESG Investing, needs of investors, capabilities of investment managers and various initiatives and standardization efforts and the future outlook.

Our Swiss ESG Investment Conference organised by CFA Society Switzerland is part of the series of events dedicated to ESG Investing as a commitment of CFA Institute to foster sustainability in investment management. This unique full-day event at Kraftwerk in Zurich features a line-up of renowned speakers representing investment managers, asset owners, financial regulators, industry associations, NGOs and academia. Join us to get inspiring insights on the "best practice" ESG investing approaches implemented by asset managers and asset owners, innovative ESG investment solutions, latest ESG investment research and surveys, standardization, regulatory and self-regulatory efforts, and to engage in exciting networking discussions.

The conference is aimed at investment professionals, asset owners and all those interested in ESG Investing.

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AGENDA 19 MAY 2022

08:30–09:00	**Registration and Refreshments** Kraftwerk Zurich
09:00–09:10	**Welcome Speech** **Sheila Ohlund, CFA** CEO of CFA Society Switzerland
09:10–09:40	**Publica's Climate Risk Strategy** **Patrick Uelfeti, CFA** Deputy Head of Asset Management at the Federal Pension Fund PUBLICA
09:40–10:10	**Sustainable Investments in Switzerland: Where Are We Heading?** **Sabine Döbeli** CEO of Swiss Sustainable Finance (SSF)
10:10–10:40	**Climate Risk: Disclosure, Regulation, Greenwashing Detection** **Prof. Markus Leippold** Professor of Financial Engineering at University of Zurich (Department of Banking and Finance)
10:40–10:55	**Networking Break**
10:55–11:45	**ESG Investing and «Greenwashing» Concerns: Is Regulation and Self-Regulation a Remedy?** Panel Discussion **Adrian Schatzmann** (AMAS) **Jürg Tobler** (ASIP) **Markus Schmid** (FINMA) **Stephan Kellenberger** (WWF) **Moderator – Dimitri Senik** (CFA Society Switzerland)
11:45–12:15	**How to Build Portfolios that Positively Contribute to the SDGs** **Kenneth Robertson** Client Portfolio Manager at Robeco
12:15–13:30	**Lunch Break / Networking**
13:30–14:05	**Relying on ESG Ratings and Benchmarks: Pragmatic Solution or a "Blind-Fight"?** **Angela de Wolff** Founding Partner at Conser **Patrick Schirmann** Founder and CEO of Norsia
14:05–14:55	**ESG Transparency of Collective Investment Funds** **Adrian Schatzmann** CEO of Asset Management Association Switzerland (AMAS)

14:55–15:15	**Networking Break**
15:15–15:45	**Overcoming ESG Data Pain Points and Opportunities for Private Markets** **Arthur Arzoumanidis, CFA** Product Owner – Client Solutions at RepRisk **Benjamin Haltinner, CFA** Vice President – Finance at RepRisk
15:45–16:10	**Implementing ESG Standards for Insurance Firms** **Paul Moody** Managing Director of CFA Institute
16:10–16:40	**ESG Investments and Swiss Pension Funds** **Dr. Stephan Skaanes, CFA** Partner and Member of the Executive Board at PPCmetrics AG
16:40–17:10	**From "Whether" to "How" the Net Zero Transition Will Happen** **Mirjam Staub-Bisang** Country Head of BlackRock Switzerland and a Member of the EMEA Executive Committee
17:10–17:20	**Closing Remarks**
17:20-19:00	**Apéro Riche**

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Due diligence on ESG and business conduct

ROBECO
The Investment Engineers

ESG CONFERENCE 2022 **GOLD SPONSOR**

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Arthur Arzoumanidis, CFA

Product Owner – Client Solutions at RepRisk

Arthur is the Product Owner of Data Feeds at RepRisk. He joined the company in 2022, and is responsible for enabling technological capabilities in transferring data to RepRisk's clients and partners. Arthur has extensive experience as a business analyst within data-centric functions in the finance industry. Before joining RepRisk, he worked at institutions with global reach including Bloomberg, M&G, and UBS, within a broad range of domains including equity research, valuation control, and financial accounting.

Arthur holds a First Class (Hons) Bachelor's degree in Financial & Business Economics from Royal Holloway, University of London.

Angela de Wolff

Managing Partner – ESG independent verifier at Conser

Angela is a Managing Partner of Conser – ESG independent verifier. Angela de Wolff has been active in the financial sector since 28 years, with a focus on Responsible Investment (RI). Among others she has been leading the sustainability team at Lombard Odier bank. In 2007, she capitalized on her experience to create www.conser.ch an independent firm specialized on sustainable investment and ESG verification. Angela is co-founder of Sustainable Finance Geneva. She sits on the Board of various financial institutions as well as on the Board of "SIFEM" the Swiss investment fund for emerging markets. Angela has been also Vice-President of the platform « Swiss Sustainable Finance » from 2016 to 2020. Ms. de Wolff obtained a Master in economics from the Lausanne University in 1989. She became a Certified European Financial Analyst (CEFA) in 2000.

Sabine Döbeli

CEO at Swiss Sustainable Finance (SSF)

Sabine has worked in the field of sustainable finance for over 20 years in different roles. She is the CEO of Swiss Sustainable Finance (SSF), an organization that was established under her lead in 2014 with the objective of making Switzerland a leading voice and actor in sustainable finance. Previously, she was Head of Corporate Sustainability Management at Vontobel where she was responsible for the sustainability strategy at group level and sustainable investment services in asset management. At Zürcher Kantonalbank she built up the sustainability research unit within the financial research department and contributed to the launch of various sustainable investment products.

Sabine holds a Masters in Environmental Sciences from the Swiss Federal Institute of Technology (ETH) Zurich and a post-graduate degree in business administration and marketing at the University of Basel. She is a member of the Advisory Committee on International Cooperation of the SwissFederal Council (BK IZA) to the Swiss Government, of the Research Advisory Council of the Swiss Federal Office for the Environment (FOEN) and of the advisory councils of the Sustainable Digital Finance Alliance (SDFA) as well as of Stiftung Drittes Millenium.

Benjamin Haltinner, CFA

Vice President – Finance at RepRisk

Benjamin is the Vice President of Finance at RepRisk. He joined the company in 2019, and is responsible for managing the globally distributed finance teams which support RepRisk's growth agenda. Benjamin has extensive experience in financial research and investment management. Before joining RepRisk, he worked as a financial analyst at the Australian Bond Exchange in Sydney, Australia. Prior to this, Benjamin headed fixed income research at Notenstein La Roche Private Bank in Zurich. He had earlier been a portfolio manager for cross-asset mandates at the bank. Benjamin holds a Master's degree in Banking and Finance from the University of Zurich, in Switzerland, and is a CFA Charterholder.

Stephan Kellenberger

Deputy Head of Sustainable Finance at World Wide Fund for Nature Switzerland (WWF)

Stephan is deputy head of sustainable finance at WWF Switzerland where he is responsible for the regulatory and policy related work. Prior to his current function, he served as a Swiss diplomat and was involved in international climate change negotiations. He has a background in politics and economics and has taken advanced training in sustainable finance.

Prof. Markus Leippold

Professor of Financial Engineering – Department of Banking and Finance at University of Zurich (UZH)

Markus is a professor at the University of Zurich, where he holds the Chair in Financial Engineering. Before joining the University of Zurich in 2009, Markus was an associate professor in quantitative finance at Imperial College Business School, London. In 2005, he was a visiting professor at the Federal Reserve Bank in New York. Markus obtained his Ph.D. in economics from the University of St.Gallen, Switzerland, in 1999, and after some years in the financial industry, he started as an assistant professor at the University of Zurich in 2002. Markus published in top academic journals like the Journal of Financial Economics, Review of Financial Studies, Management Science, and Annals of Statistics. His work was awarded best paper prizes from the European Management Association, Inquire Europe, RISK Magazine, and the German Finance Association. Most recently, in 2019, Markus spent a research semester at Google, digging deeper into research on natural language processing.

Paul Moody

Managing Director – Global Partnerships & Client Solutions at CFA Institute

Paul is Managing Director, Global Partnerships & Client Solutions, at CFA Institute. He oversees all customer outreach in the Americas, EMEA, and Asia-Pacific regions, as well as guiding relationships with 160 societies globally. His role focuses on ensuring the voice of the customer is embedded into day-to-day operations at CFA Institute. Prior to joining CFA Institute in early 2022, Paul worked at Aviva Investors for 21 years, with his last role being Client Solutions Director. In that capacity, he led a global team, developing relationships and partnering with Aviva's global businesses to benefit both shareholder and policyholder funds, including pathways to Net Zero. Paul has deep experience in product and business development in the asset management industry and was one of the pioneers of the UK's first ESG fund products. Paul holds the Alternative Investment Analyst Charter (CAIA) and a degree in economics from the University of Wolverhampton. Paul is based in London and is married with two children.

Kenneth Robertson

Client Portfolio Manager at Robeco

Kenneth is Client Portfolio Manager at Robeco, covering Robeco's offering in the areas of sustainable investing, with a focus on active ownership. Previously, he worked within Robeco's Active Ownership team as an Engagement Specialist and Analyst. He started his career at Robeco in 2014. Kenneth holds a Master's in Sustainable Business and Innovation from Utrecht University and a Bachelor's in Sustainable Development from the University of St. Andrews.

Adrian Schatzmann

CEO of the Asset Management Association Switzerland (AMAS)

Adrian became CEO of the Asset Management Association Switzerland (AMAS) in January 2021. Prior to that, he held various consulting positions, including with the Swiss Bankers Association (SBA), and was founder and Managing Director of Clear Minds Investment AG. Adrian worked for UBS for more than 20 years in Switzerland and Asia in roles such as head of global fund and ETF distribution. He studied economics at the University of St. Gallen.

Patrick Schirmann

Founder and CEO at Norsia

Patrick started his career in the wealth management industry in Zurich before working for 15 years on the trading floors of multinationals in London and Geneva. From these experiences came his conviction that technology should be used to promote a more personalized approach to sustainable finance. This belief is the starting point of Norsia an early stage start-up based in Geneva and currently hosted at F10, the FinTech incubator in Zürich. Patrick studied Economics at HEC Lausanne and Market Finance at Paris Dauphine University, and holds a Certificate of Advanced Studies in Sustainable Finance from HEG Genève. He is a member of Sustainable Finance Geneva and of the "Acteurs de la Finance Responsible" in France.

Markus Schmid

Technical Expert at Swiss Financial Market Supervisory Authority (FINMA)

Markus is working as an expert within the supervision team in the Asset Management Division of FINMA. He joined FINMA in 2016. Previously he worked for more than 20 years at Pricewaterhouse Coopers as lead auditor in the financial services area with an asset management focus. He is a certified public accountant (CPA) and certified financial analyst (CFA).

Dr. Stephan Skaanes, CFA

Partner and Member of the Executive Board of PPCmetrics

Stephan is a partner and member of the Executive Board of PPCmetrics. He earned a doctoral degree at the University of Zurich, specialising in banking and finance. He has been certified as a "Chartered Financial Analyst (CFA)", "Financial Risk Manager (FRM)" and "Chartered Alternative Investment Analyst (CAIA)". He is also a lecturer at the University of Zurich.

Mirjam Staub-Bisang

Country Head of BlackRock Switzerland and a Member of the EMEA Executive Committee

Mirjam is Country Head of BlackRock Switzerland and a Member of the EMEA Executive Committee as well as a Senior Advisor to BlackRock Sustainable Investing. Prior to BlackRock, Mirjam led an investment management firm focusing on sustainable investing based in Zurich. Mirjam also served as a non-executive director on the boards of public and private companies and as chair of the investment committees of several asset owners such as pension funds and endowments. Prior to these roles she held senior positions in asset management and private equity investing at Commerzbank and Swiss Life and worked in investment banking at Merrill Lynch in London and Zurich. Today she serves on the board of the global shoe retailer Bata as a non-executive director.

Mirjam holds a PhD in Law from the University of Zurich and an MBA from INSEAD. She authored the standard work 'Sustainable Investing for Institutional Investors: Risks, Regulations, Strategies' and co-authored the second edition of 'Infrastructure as an Asset Class'. In 2009 she was elected a Young Global Leader of the World Economic Forum.

Dr. Jürg Tobler

Head of Investments at the Pension Fund City of Zurich (ASIP)

Jürg is Head of Investments at the Pension Fund City of Zurich since 2011. He joined the investment department in 2006. Before this, he was with Cantonal Bank of Zurich as Head of Fixed Income Research and in the Asset Management. Jürg Tobler is member of the "Kommission für Anlagefragen" of ASIP.

Patrick Uelfeti, CFA

Deputy Head of Asset Management at the Federal Pension Fund PUBLICA

Patrick is Deputy Head of Asset Management at the Federal Pension Fund PUBLICA. His responsibilities include portfolio management, selection and monitoring of external monitoring of external managers, as well as the further development and implementation of the investment strategy. Patrick Uelfeti has been working in Asset Management at PUBLICA since 2010. He was previously with the Swiss private bank Clariden Leu (formerly Bank Leu) in various research functions. Most recently as Head of Equity and Fund Research. He began his professional career as an economist at the American Embassy in Bern. He completed his education as an economist at the University of Geneva with a Bachelor's degree and at the HEC Lausanne with a Master of Science in Economics. From the University of Applied Sciences of Northwestern Switzerland (FHNW), he holds a Master's degree in Environmental Engineering and -management. He is a CFA charterholder and guest lecturer at the FHNW.

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 3,000 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

THE VENUE | **KRAFTWERK, ZURICH**

Kraftwerk is based in the ewz-Unterwerk Selnau, a former electrical transformer station in the heart of Zurich. In the summer of 2017, this beautiful, protected building was converted into a unique and inspiring co-working space.

Kraftwerk operates according to the values and principles of Impact Hub Zurich`s Co-Manifesto. At the center of the manifesto is a strong belief that the great challenges of our time can only be solved through cooperation and collaboration (not isolation). This requires bringing unlikely allies together and enabling cross-sector and cross-corporate collaboration. Kraftwerk is where collaborative innovation has a home and will thrive in the future. Inspired by the beauty and sustainability of this place, as well as its values and guiding vision, we are confident that we have found the perfect place for our ESG Conference.

#ESG22 AGENDA TEAM

Dimitri Senik, CFA, *PwC, Chair ESG Conference 2022*

Aurelie Made, CFA, *FRM, Partners Group*

Dominique Bruggmann, CFA, *EY*

Ekaterina Chubarova, CFA, *International Labour Organization*

Markus Winkler, CFA, *Baker McKenzie*

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

Severin Landert, *Pension Fund of Credit Suisse Group*

Stephan Skaanes, CFA, *CAIA, FRM, PPCmetrics AG*

Claudia Zimmermann, CFA, *C-Advisory*

Melissa Spinoso, CFA, *LGT Private Banking*

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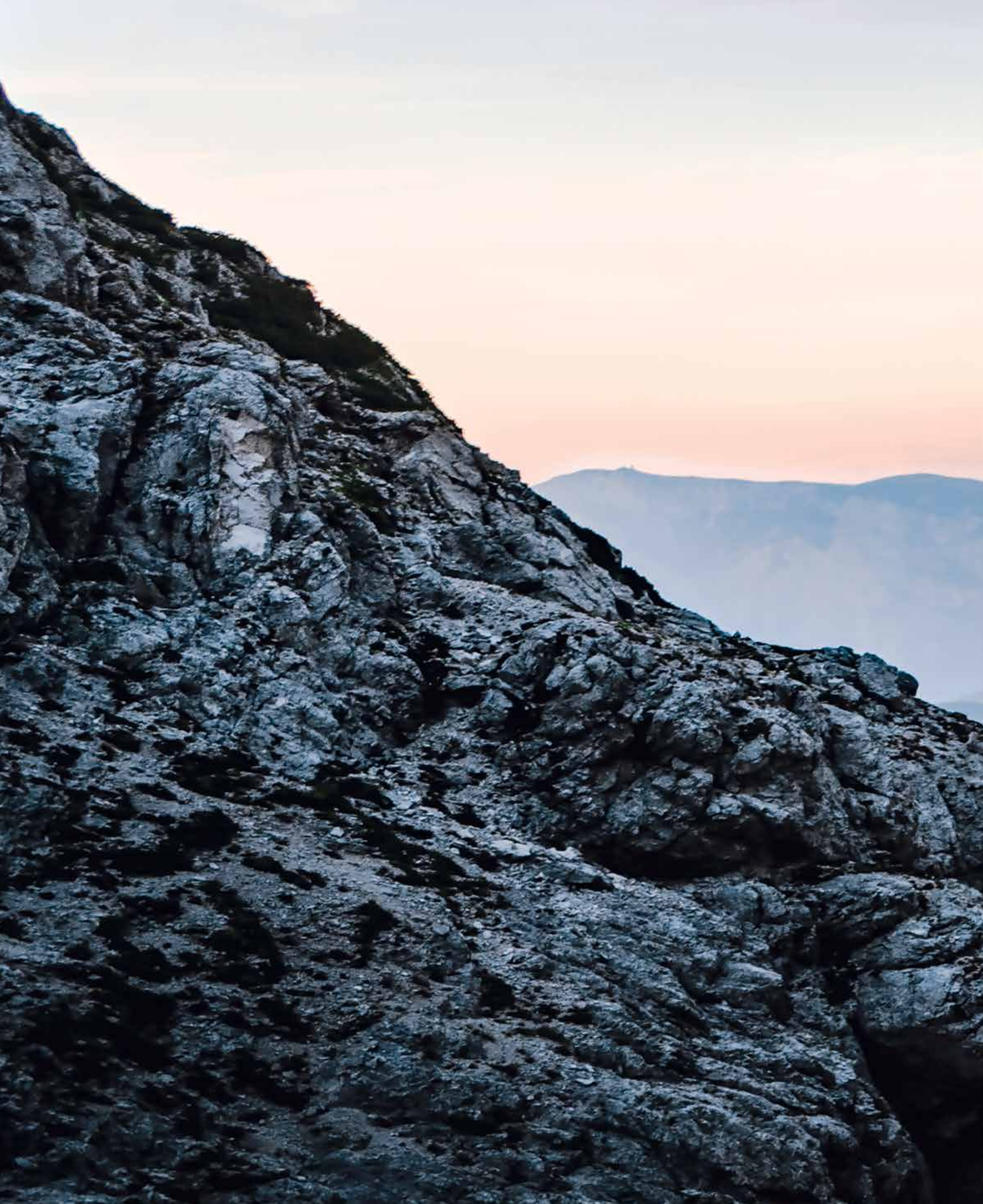

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+41 44 382 4244
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