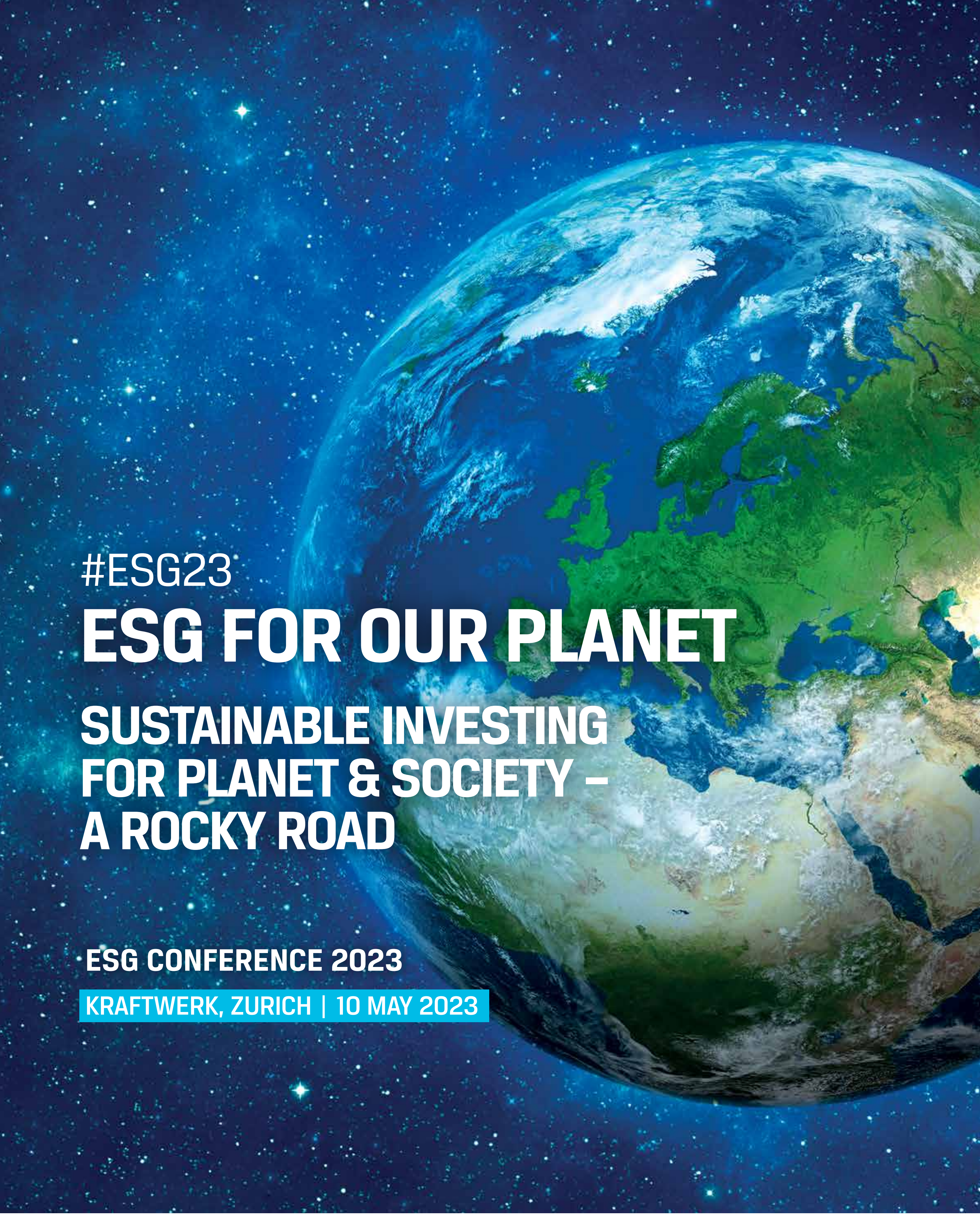


#ESG23

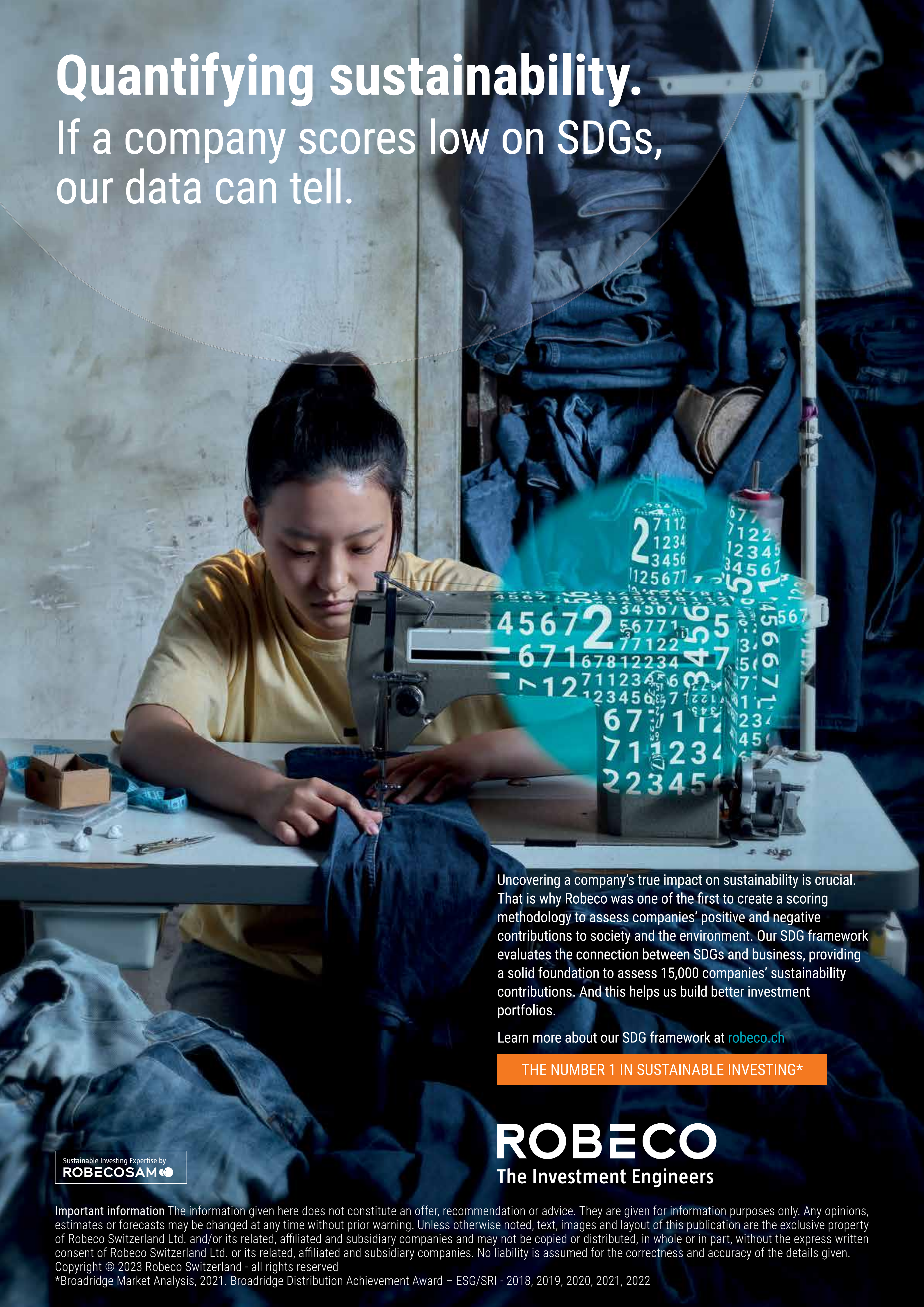
ESG FOR OUR PLANET

SUSTAINABLE INVESTING FOR PLANET & SOCIETY – A ROCKY ROAD

ESG CONFERENCE 2023

KRAFTWERK, ZURICH | 10 MAY 2023

CFA Society Switzerland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*Broadridge Market Analysis, 2021. Broadridge Distribution Achievement Award – ESG/SRI - 2018, 2019, 2020, 2021, 2022

Sustainable Investing for Planet & Society – A Rocky Road

The Annual ESG Investment Conference of CFA Society Switzerland is part of the series of events dedicated to Environmental, Social and Governance (ESG) Investing as a commitment of CFA Institute to foster sustainability and ESG awareness in investment management. After a huge success of the inaugural 2022 ESG Annual Conference of CFA Society Switzerland, our 2023 Conference will follow up this year on the evolving topics around ESG Investing, such as investors' needs and expectations, ESG investment approaches and solutions, integration of ESG factors in investment process, measurement of ESG metrics, ESG investment reporting, as well as Swiss and international regulatory and self-regulatory initiatives on transparency and disclosure.

This unique full-day event features an exciting agenda of plenary and break-out sessions and a line-up of renowned speakers representing the Swiss Government, financial industry associations, investment managers, asset owners, corporates, NGOs and academia who will be discussing the above-mentioned topics in a casual atmosphere of the Kraftwerk event center in Zurich. Join us to get inspiring insights on the "best practice" ESG investing approaches and solutions from investment managers and asset owners, the impact of sustainability efforts of the food-industry companies, latest ESG investment academic research and on Swiss and international regulatory and self-regulatory efforts in the sustainable investing area as well as 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 10 MAY 2023

08:30–09:00	**Registration and Refreshments** Kraftwerk Zurich
09:00–09:05	**Welcome Speech** **Sheila Ohlund, CFA** CEO of CFA Society Switzerland
09:05–09:45	**Promising Recent ESG Research Trends: Going Beyond Performance Analysis** **Prof. Dr. Julian Kölbel** Assistant Professor for Sustainable Finance, University of St. Gallen **Prof. Dr. Markus Schmid** Professor of Corporate Finance at the University of St.Gallen and a member of the Board of Directors of the Swiss Institute of Banking and Finance **Moderator: Sheila Ohlund, CFA**
09:45–10:30	**Corporate Sustainability Perspectives: From Inside-out to Outside-in** **Owen Bethell** Environmental Impact Lead Global Public Affairs at Nestlé **Janine Hofer-Wittwer, CFA** Head of ESG Data and RegRisk Services, SIX **Christophe Volonté** CEO of Inrate **Moderator: Prof. em. Dr. Thomas Dyllick** The Institute for Business Sustainability, Lucerne, and University of St.Gallen
10:30–11:00	**Break / Networking**
11:00–11:45	**Water as an Environmental Challenge** **Sébastien Bourget** Managing Partner, Head of Infrastructure, Quaero Capital S.A. **Antoine Turrettini** Investment Director, Quaero Capital S.A. **Moderator: Aurélie Made, CFA**
11:00–11:45	**Climate Beta: An Innovative & Forward-Looking Climate Risk Measure** **Frank Wirds, CFA** Director Sustainable Index Solutions, Robeco **Moderator: Ekaterina Chubarova, CFA**
11:45–12:30	**ESG Investing: Is self-regulation filling the regulatory gap?** **Alannah Beer** Policy Advisor Sustainable Finance at Swiss Bankers Association **Sabine Döbeli** CEO of Swiss Sustainable Finance **Adrian Schatzmann** CEO of Asset Management Association Switzerland **Jürg Tobler** Head of Investments at the Pension Fund City of Zurich **Moderator: Dimitri Senik, CFA**

12:30–14:00 **Lunch Break / Workshops**

Workshops Topics:

A. Is self regulation filing the regulatory gap?
Table Experts: Alannah Beer, Sabine Döbeli, Adrian Schatzmann, Jürg Tobler
Moderator: Dimitri Senik, CFA

B. How corporations manage different ESG rating systems
Table Experts: Owen Bethell, Christopher Fidler, Christophe Volonté, Frank Wirds, CFA
Moderator: Claudia Zimmermann, CFA

C. How can climate strategies promote positive social impact?
Table Expert: Sébastien Bourget
Moderator: Aurélie Made, CFA, FRM

D. Does biodiversity eat Climate for breakfast?
Table Expert: François Millet
Moderator: Severin Scrugli

E. Influence of AI on data: From Known-Unknowns to Unknown-Unknows?
Table Expert: Prof. Dr. Markus Schmid
Moderator: Michael Haene, CFA, FRM

F. Real impact of ESG investing
Table Expert: Jeroen Bos, CFA
Moderator: Dominique Bruggmann, CFA

14:00–14:30 **Industry Codes & Standards**

Christopher Fidler Head, Industry Codes & Standards, CFA Institute

Moderator: Severin Scrugli

14:30–15:15 **How to Integrate Biodiversity In Investment: Avoid, Minimize, Restore**

François Millet Head of Climate & Thematic Business Development – Amundi ETF, Indexing & Smart Beta

Moderator: Claudia Zimmermann, CFA

14:30–15:15 **Net Zero In Practice**

Jeroen Bos, CFA Global Head of Sustainable Investing, Credit Suisse Asset Management

Moderator: Dimitri Senik, CFA

15:15–15:35 **Networking Break**

15:35–16:05 **Paris Aligned Climate Transparency in the Financial Market**

Christof Baumann, CFA Envoy for Sustainable Finance, Swiss State Secretariat for International Finance

Moderator: Dominique Bruggmann, CFA

16:05–16:35 **Presentation of workshop discussions**

16:35–16:45 **Closing Remarks**

16:45-18:00 **Apéro Riche**

CHRISTOPH BAUMANN, CFA

**Envoy for Sustainable Finance,
Swiss State Secretary for International Finance**

Christoph Baumann is Envoy for Sustainable Finance at the State Secretariat for International Finance (SIF). In this role, he leads the Swiss government's sustainable finance activities, ranging from negotiations in multilateral bodies to domestic regulatory projects. Before joining SIF, he worked in executive positions at financial institutions and fintechs. He is a Policy Fellow at the University of Cambridge and holds a Master degree in Economics from the University of Zurich, a Postgraduate Diploma in International Law from the University of London, and is both a CFA and FRM charterholder.

ALANNAH BEER

Policy Advisor Sustainable Finance at SBA

Alannah Beer is a Sustainable Finance policy advisor at the Swiss Bankers Association (SBA). She focuses on sustainability in the context of banking regulations, with a particular focus on all self-regulation where she played an instrumental role in defining key elements. She is also in regular contact with governmental and supervisory authorities in Switzerland and connects with relevant international institutions. At the SBA, Alannah is centrally involved in the current work on the development of the Sustainable Finance framework, including in particular the Net Zero alliances and current regulatory developments in Switzerland. Alannah holds a Master's degree in Political Economics from the University of Lucerne.

OWEN BETHELL

Environmental Impact Lead Global Public Affairs at Nestlé

Owen is Environmental Impact Lead for Nestlé globally – the world's largest food and beverage company. Owen manages Nestlé's global climate change, nature and water related advocacy, communications and engagement activities. He is also responsible for topics related to animal welfare within the Public Affairs and ESG Engagement team. In this role, Owen advises and guide's Nestlé interactions with multi-lateral institutions, business associations, investors, stakeholders and other coalitions of action on the environmental agenda – supporting the company's aim to advance regenerative food systems at scale. Recent examples include leading Nestlé work in supporting the achievement of a Global Biodiversity Framework in Montreal in December 2022. Prior to taking on this role, Owen headed up Nestlé's global issue and crisis management function. Before joining Nestlé, Owen advised clients in the food, agriculture and health sectors on corporate communications and public affairs programs.

JEROEN BOS, CFA

Global Head of Sustainable Investing at Credit Suisse Asset Management

Jeroen Bos is the Global Head of Sustainable Investing at Credit Suisse Asset Management. Jeroen joined Credit Suisse in January 2022 from NN Investment Partners where he was the Head of Equities & Responsible Investing and part of the Management Team Investments. Prior to that, he worked as a Director at UBS in New York and a Vice President at JPMorgan in London. He started his career at MeesPierson in Amsterdam in 1999 where he was a Senior Equity Analyst.

In addition to his role at Credit Suisse, Jeroen sits on the Investment Committee of the Rail & Public Transport Pension fund in the Netherlands, is a board Member of the AdoptRainforest Foundation, sits on the Advisory Board of SPO Pension Education and is a member of CFA Institute's Global ESG Working Group. In the '08-'21 period Jeroen was also a board member of CFA Society VBA Netherlands.

Jeroen holds a degree in Economics from the Free University of Amsterdam (VU). In addition, Jeroen is a CFA charterholder and holds the CAIA, CMA, CFA ESG and Certified Pension Executive (CPE) certifications. Lastly, Jeroen completed INSEAD's International's Directors Program and Harvard's Investment Management Program.

SÉBASTIEN BOURGET

Managing Partner, Head of Infrastructure, Quaero Capital S.A.

Sébastien Bourget joined Quaero Capital SA in 2014 as Head of Quaero European Infrastructure Fund and Managing Partner. Sébastien has a strong expertise in infrastructure finance. He notably worked at Edmond de Rothschild since 2006 within the infrastructure and project finance advisory department, where he successfully led several landmark transactions in areas such as railways, motorways, social, utilities, renewables and telecom.

Sébastien gained a MPhil in private law from the University of Paris I – La Sorbonne and the Ecole des Hautes Etudes en Sciences Sociales, a MSc specialized in project finance from the Ecole Nationale des Ponts et Chaussées and the University of Paris X, and is graduated from the Rouen Business School (Neoma).

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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.

PROF. EM. DR. THOMAS DYLLICK

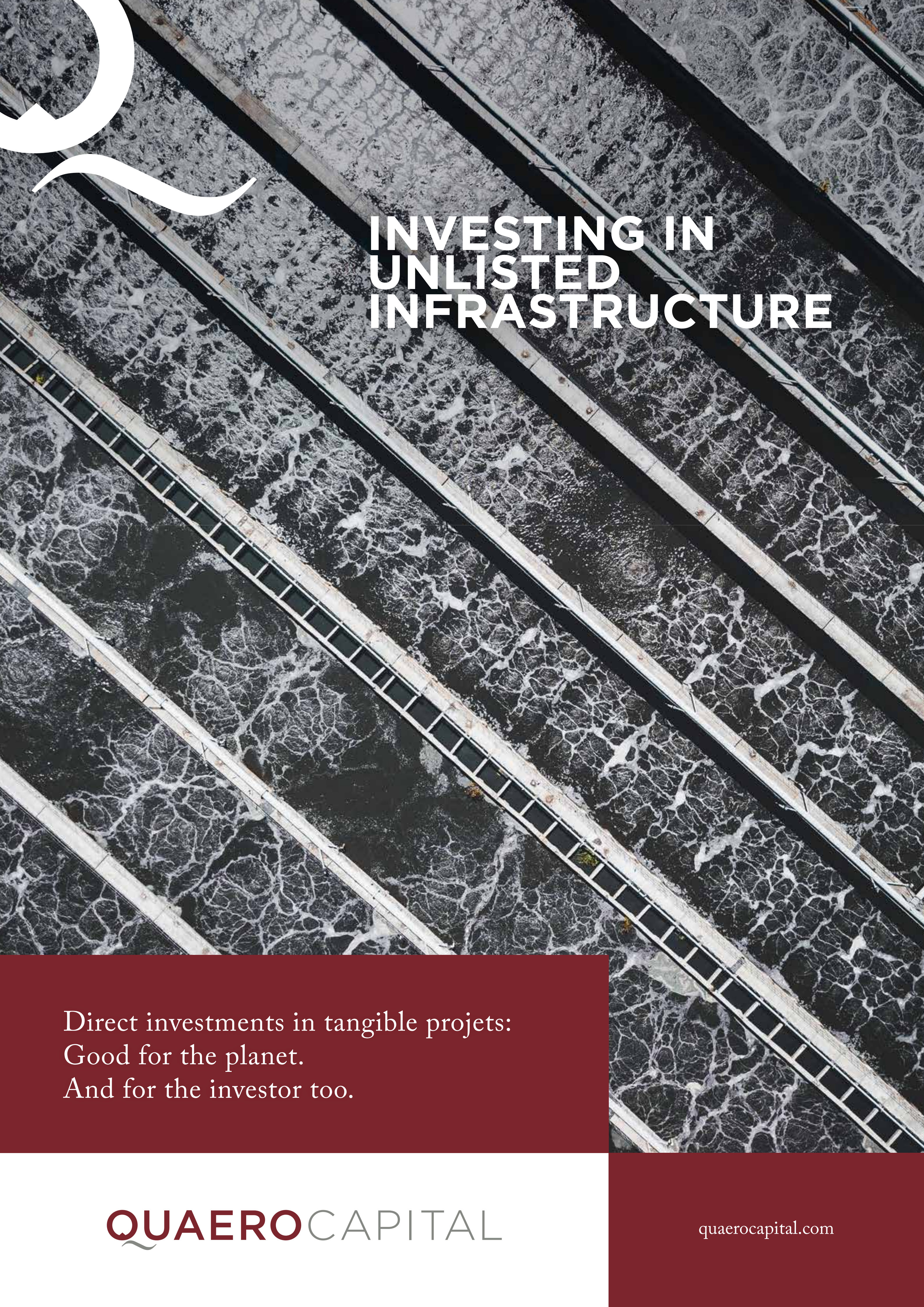
President and Director,
The Institute for Business Sustainability (IBS), Lucerne

Thomas Dyllick is Professor emeritus at University of St.Gallen; President and Director, The Institute for Business Sustainability (IBS), Lucerne, Switzerland; Co-founder and Member of the Supervisory Board, Co-founder and member of the Supervisory Board, Positive Impact Rating Association, and Co-founder and Director, Executive Diploma in Advanced Sustainability, endorsed by UN Global Compact Switzerland and Liechtenstein, World Business Council for Sustainable Development, and WWF Switzerland. He was Professor for Sustainability Management 1994 – 2019, Co-founder and Managing Director 1992-2019 at Institute for Economy and the Environment, Dean School of Management 2001-2003, Vice-President for Teaching and Quality Development 2003-2011, and University Delegate for Responsibility and Sustainability 2011 – 2020, all at University of St.Gallen. He has been practically engaged, speaking, and publishing broadly in the areas of sustainability strategy and management as well as responsible management education.

CHRISTOPHER FIDLER

Head, Industry Codes & Standards, CFA Institute

Chris Fidler is a Head in the Codes & Standards team at CFA Institute. He led the development of the Global ESG Disclosure Standards for Investment Products—the first global voluntary standards for disclosing how an investment product considers ESG issues in its objectives, investment process, and stewardship activities. Mr. Fidler has expert-level knowledge of investment product ESG disclosure regulations globally, and currently serves on the UK FCA Disclosure & Labelling Advisory Group. Prior to joining CFA Institute, Mr. Fidler was a management consultant at Thought Logic Consulting, LLC, and served in a number of management and analyst roles at Capital One Financial Corporation. He holds a Bachelor of Science degree in mechanical engineering from University of Illinois and a Master of Business Administration from the Darden School of Business at University of Virginia.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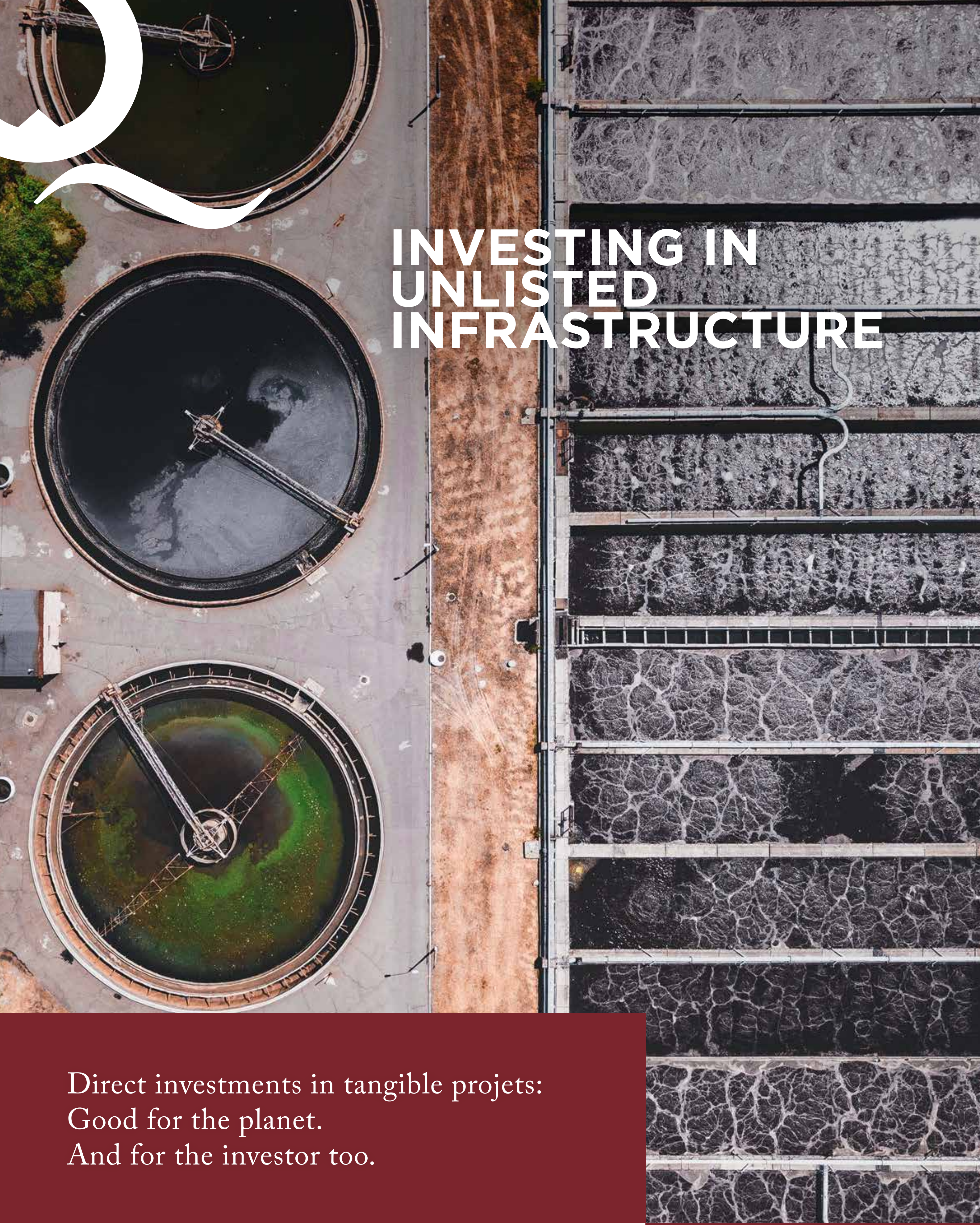

JANINE HOFER-WITTWER, CFA

Head of ESG Data and RegRisk Services

Janine Hofer-Wittwer has been with SIX since 2014. Upon the move of SIX Financial Information into ESG and sustainability several years ago, she has been responsible for creating that proposition and by doing so contributing to more sustainability in finance and economy, which is a topic very close toher heart. Her role entails analyzing market trends, defining a strategy and leading the creation of innovative services for the wealth, asset and risk management industry. Prior to that she has been driving the development of risk and analytics services. Before joining SIX, Janine Hofer-Wittwer worked at UBS in Private Banking and at the Investment Bank both in Switzerland and abroad. After UBS she joined Bank of America Merrill Lynch in London where she was a Risk Manager for several years. Janine Hofer-Wittwer has a Master's Degree in Business Administration and Economics from the University of Berne and is a CFA charter holder.
She also holds a Certificate in ESG Investing from the CFA Institute.

PROF. DR. JULIAN KÖLBEL

Assistant professor of sustainable finance at the University of St. Gallen, School of Finance and Center for Financial Services Innovation

Dr. Julian Kölbel is assistant professor of sustainable finance at the University of St. Gallen, School of Finance and Center for Financial Services Innovation. He is also a research affiliate at MIT Sloan, where he is a co-founder of the Aggregate Confusion Project, and faculty member of the Swiss Finance Institute. His research covers the real-world impact of sustainable investing, analysis of environmental, social and governance (ESG) metrics, and investor preferences for sustainability. Julian has studied at ETH Zurich and the University of Oxford. Next to his academic work, he serves on the investment committee of the Swiss pension fund Abendrot.

FRANÇOIS MILLET

Head of Climate & Thematic Business Development – Amundi ETF, Indexing & Smart Beta

Also acting as head of Innovation, Francois was previously overseeing strategy, ESG and innovation at Lyxor ETF. He was involved in the introduction of the first Green bond ETF worldwide, first Global Gender equality ETF, and the first range of ETFs tracking labelled EU Climate benchmarks. Prior to this he was Product Line Manager-ETF & Indexing overseeing passive and smart beta. He joined Lyxor in 2009 as Head of Index and Quantitative Fund Development, after supervising Index Fund & ETF Business Development at Societe Generale AM AI. Prior to joining asset management Francois spent 19 years in corporate finance including 14 years with SG CIB, in various executive and management positions within the Equity Capital Markets business line. François holds a Masters in Economics and Master 2 in Money & Finance from Paris 1-Panthéon Sorbonne, as well as M2 in International trade from Paris 2-Assas University.

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CFA Institute

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Enroll in the CFA exam through the CFA Institute website www.cfainstitute.org/programs/cfa/register

Step 2

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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.

PROF. DR. MARKUS SCHMID

Professor of Corporate Finance at the University of St.Gallen and a member of the Board of Directors of the Swiss Institute of Banking and Finance

Prof. Dr. Markus Schmid is Professor of Corporate Finance at the University of St.Gallen and a member of the Board of Directors of the Swiss Institute of Banking and Finance. His scientific interests lie in the areas of empirical corporate finance, corporate governance and household finance. He is a member of numerous research societies and Vice President of the Swiss Society for Financial Market Research. Since 2012 he has been Managing Editor of the journal "Financial Markets and Portfolio Management

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 the Swiss Pension Funds Association (ASIP).

ANTOINE TURRETTINI

Investment Director, Quaero Capital S.A.

Antoine Turrettini joined Quaero Capital SA in 2014 as Investment Director for Quaero European Infrastructure Fund. Previously, Antoine worked at Edmond de Rothschild within the infrastructure and project finance advisory department. He was notably involved in the financial structuring of landmark infrastructure transactions in areas such as railways, motorways, social, utilities & renewables mainly in Europe. Before joining the infrastructure team in 2008, he had an experience within the Corporate Finance department of Edmond de Rothschild in London focusing on M&A transactions. He also had a work experience at Orbis Investment Advisory in London. Antoine is a graduate from the European Business School London in International Business with major in Finance.

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- (Cameron F, Senior Manager Research Analyst)

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CHRISTOPHE VOLONTÉ

CEO of Inrate

Dr. Christophe Volonté has been CEO of Inrate since 2022. He joined Inrate in 2016 and was responsible for the proxy voting and engagement services. He studied business and economics at the University of Basel where he also received his PhD. He was a PostDoc and lecturer at the University of Basel and Konstanz in the field of corporate finance and governance. Christophe Volonté has completed several research visits abroad, has published in international journals, and continues to give lectures.

FRANK WIRDS, CFA

Director Sustainable Index Solutions at Robeco

Frank Wirds is Director Sustainable Index Solutions at Robeco. In this capacity he supports Robeco's sales force globally and conducts client and consultant meetings, speaks at conferences and gives seminars about Robeco's Sustainable Index Research and Products. Frank's team works closely together with specialists from Robeco's SI Center of Expertise in co-authoring academic papers and client research articles related to sustainability metrics, climate risk metrics and investment implications of sustainability integration. Frank has been a Client Portfolio Manager since March 2012 and joined Robeco in 2006. He has worked for eight years as a Client Portfolio Manager Quant Equities in Hong Kong covering the Asia-Pacific region and he has worked as a Product Specialist (Quant) EmergingMarkets Equities at Robeco Investment Management in New York. Frank holds a Master's in Financial Economics from Erasmus University Rotterdam and he is a CFA charterholder.

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CONFERENCE ORGANIZATION

CFA Society Switzerland

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

#ESG23 AGENDA TEAM

Dimitri Senik, CFA, PwC, Chair ESG Conference 2023

Aurelie Made, CFA, FRM, Partners Group

Dominique Bruggmann, CFA, EY

Ekaterina Chubarova, CFA, International Labour Organization

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

Severin Scrugli, Bank J. Safra Sarasin AG

Stephan Skaanes, CFA, CAIA, FRM, PPCmetrics AG

Claudia Zimmermann, CFA, C-Advisory

Melissa Spinoso, CFA, LGT Private Bank

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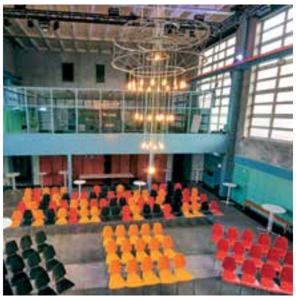

Kraftwerk is based in the ewz-Unterwerk Selnau, a former electrical transformer station in the heart of Zurich. In the summer of 2017, this beautiful, protected building was converted into a unique and inspiring co-working space.

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.

CFA Society Switzerland

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