



# **CFA Institute Certificate in ESG Investing**

Quartic Training Exam Prep Course





# Introduction

**The CFA Institute Certificate in ESG Investing explores environmental, social and governance issues in the context of investment decision-making.**

**The Quartic programme is designed to make learning enjoyable and the content intuitive.**

The Certificate in ESG Investing is designed for investment practitioners of all levels – you may be looking to start a career in finance or you may already be running a global multi-asset class fund. You may also be advising on or distributing financial products, or working in risk management: the application of this qualification is broad indeed.

Stay ahead in your field and provide additional ESG benefits to your clients with knowledge gained by studying for the CFA Institute Certificate in ESG Investing.

**Local CFA Society members and CFA candidates can enjoy an enhanced discount on all Quartic ESG prep courses.**



# Study Information

## Materials

For the **ESG Live** programme, you will receive from Quartic:

- An e-book containing slides that cover the whole syllabus (a printed workbook is available for a small supplemental fee to cover printing and shipping).
- A schedule of 8 one-hour live workshop sessions, with multiple workshop presentations during the day to accommodate all time zones.
- A video library with 15 to 20 hours of detailed explanations of the syllabus.
- An extensive question bank containing more than 500 exam-style questions, including two full-length mock exams.
- Quartic tutor support from registration until your exam day.
- **Finance Essentials:** an additional section providing background knowledge on asset valuation, portfolio theory and financial analysis.

For the **ESG Online** you will receive the same content except for live workshops.

An online version of the Official Training Manual will be part of the cost of registration with CFA UK. You may, in addition, purchase a hardcopy manual.

## Syllabus

The syllabus contains the following nine chapters:

1. Introduction to ESG
2. The ESG Market
3. Environmental Factors
4. Social Factors
5. Governance Factors
6. Engagement and Stewardship
7. ESG Analysis, Valuation and Integration
8. ESG Integrated Portfolio Construction and Management
9. Investment Mandates, Portfolio Analytics and Client Reporting

## 100 to 150

hours should be spent on studying for the ESG Certificate.

We recommend spending at least an hour a day on this so that you can sit the exam within three to four months of starting.

Although you will have a year from registration in which to do the exam, a more intense timetable will make the studying more efficient.

## IMC

If you have also passed the level 4 IMC exam then you will be awarded the CFA UK Level 4 Diploma in Investment Management (ESG).

# Examinations & Qualifications

## Examinations

The **exam** contains **100 multiple choice questions**, including a few (multi-question) item sets, and candidates have **2 hours 20 minutes** to complete the paper.

You can sit the exam either at a Pearson VUE centre (hundreds of locations around the world) or at home using the OnVUE Online Proctoring service.

To pass the exam you will need a score of at least 60 to 70%. The exact pass mark is not published but is adjusted to take account of question difficulty. You get your provisional result immediately at the end of the exam.

## Qualification

When you pass the exam you will receive the **CFA UK Level 4 Certificate in ESG Investing**.

## Finance Essentials

We have included an additional section at the back of our workbook to provide background knowledge on areas of finance within ESG. These include quantitative methods, accounting, asset classes and portfolio theory, with video explanation of each concept. Although not directly examinable, the Finance Essentials section provides invaluable background to ESG candidates who would like to improve their knowledge.

## Prerequisites

There are **no formal prerequisites** to studying the ESG Certificate.

A knowledge of the investment process is useful but not essential. You will also see accounting and mathematical terminology, all of which is explained in the Finance Essentials section.

The exam contains no calculations. Calculators are not permitted (or needed) in the exam itself.





## Benefits of the ESG Certificate in Investing

Asset owners and investment management clients are increasingly asking ESG-focused questions relating to their portfolios:

- How green is the portfolio?
- What is the carbon footprint of the investee companies?
- How is the workforce treated throughout the supply chain?
- Do directors and senior managers have conflicts of interest?
- Are all stakeholders, including local communities and the environment, benefitting from corporate policies?
- How do the ESG credentials of the portfolio compare to a suitable benchmark?

**The knowledge gained by studying for the Certificate in ESG Investing will help you to address these questions and enhance the ESG credentials of your portfolios.**

### Booking and Information

Detailed course information is available on our [website](#).

For booking or other queries, please contact us:

- by phone at +44 (0) 20 7776 7500
- or by email at [info@quartic.co](mailto:info@quartic.co)





