

● Client Portfolio Management

Context of change and impact on job tasks

Asset management firms are increasing sustainability-screened or -aligned investment funds and alternative sustainable investment opportunities as sustainability gain prominence in the investment industry. The job role holder will be expanded to support clients in navigating the complex landscape of sustainable finance and investing.

When discussing investment strategies with clients, the job role holder will need to consider client's investment objectives and sustainability preferences. They will also need to share relevant sustainable investment strategies (e.g. impact investing, sustainable investing, thematic investing, sustainability alignment, sustainability integration), key sustainability trends, social/environmental risks, carbon markets, climate change impact, and non-financial industry sustainability developments and be skilled at explaining how these factors can impact investment returns. While doing so, they should uphold sustainability stewardship to organisation's investment objectives and sustainability agenda can be achieved.

When presenting investment performance information to client, the job role holder will need to incorporate information on sustainability performance and risk metrics (e.g. taxonomy alignment, sustainability risk rating) according to internationally recognised frameworks and standards (e.g. TCFD, ISSB, SFDR, MSCI).

Time horizon of impact: Immediate

Impact on key job tasks

● High augmentation ● Moderate augmentation ● Low augmentation

Critical work function	Additional key job task	Impact on job task
Manage client relationships	<ul style="list-style-type: none">Respond to client enquiries and request regarding different sustainable investment approaches and its application to the organisation's portfolio strategiesPresent sustainable investment strategies to sales and marketing teamsIncorporate information on sustainability performance and risk metrics (e.g. taxonomy alignment, sustainability risk rating, SFDR, TCFD, ISSB, MSCI) in investor communications	●
Present information to relevant stakeholders	<ul style="list-style-type: none">Define and execute organisation's guidelines for client reporting requirements with reference to internationally recognised frameworks and standards (e.g. TCFD, ISSB, SFDR)Incorporate relevant sustainability metrics and taxonomy classification (portion of revenues, capital expenditures and operational expenditures where relevant) in product factsheetsWhere relevant to client's investment objectives and sustainability preferences, incorporate considerations for sustainability stewardship and sustainable investment strategies (e.g. impact investing, sustainable investing, thematic investing, sustainability alignment, sustainability integration), key sustainability trends, social/environmental risks, carbon markets, climate change impact, and non-financial industry sustainability developments in client presentations	●
Manage investment strategies	<ul style="list-style-type: none">Ensure investment strategies align with client's investment objectives and sustainability preferencesConduct portfolio reviews to ensure that appropriate sustainability factors have been considered based on client's investment objectives and sustainability preferences	●

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SF TSCs needed

• Carbon Markets and Decarbonisation Strategies Management	L3	L4	L5
• Climate Change Management	L3	L4	L5
• Impact Indicators, Measurement and Reporting	L3	L4	L5
• Natural Capital Management	L3	L4	L5
• Non-Financial Industry Sustainability Developments	L3	L4	L5
• Sustainability Stewardship Development	L3	L4	L5
• Sustainable Investment Management	L3	L4	L5
• Taxonomy Application	L3	L4	L5