

● Portfolio / Investment / Fund Management

Context of change and impact on job tasks

Private banking and wealth management firms are increasingly creating sustainability-screened or -aligned investment funds and alternative sustainable investment opportunities as sustainability gains prominence in the investment industry. This job role holder will need to adapt to changing investor preferences and regulatory landscapes, and the increasing importance of sustainability factors in investment decision-making.

This job role holder will need to incorporate sustainability factors into investment decision-making processes. In order to do so, they will need to define material sustainability targets, KPIs and outcomes for the sustainability-related portfolio.

During investor meetings to determine sustainability strategies, this job role holder should uphold sustainability stewardship, apply knowledge on taxonomy alignment and sustainable investment objectives, as well as considerations for key sustainability trends and social/environmental risks, carbon markets, climate change impact, and non-financial industry sustainability developments. They also need to understand and articulate relevant impact measurements and metrics (e.g. taxonomy alignment, sustainability risk rating, MSCI rating) when sharing research findings on financial forecasting and valuation.

Additionally, they need to keep abreast of new sustainability investment guidelines and ensure that investment portfolios are aligned to sustainability related guidelines and labels (e.g. Ecolabel, SFDR article 8,9, Paris Aligned Benchmarks). They should also work with compliance team to update sustainability-related policies accordingly.

Time horizon of impact: Within the next three years

Projected % increase in FTE (by year)<sup>a</sup>

2025	2027	2032
6%	10%	10%

Impact on key job tasks

● High augmentation ● Moderate augmentation ● Low augmentation

Critical work function	Additional key job task	Impact on job task
Execute strategic decisions and evaluate performance	<ul style="list-style-type: none"><li>Define organisations investment strategies for sustainability alignment, integration and impact investments</li><li>Define material sustainability targets, KPIs and outcomes for the sustainability-related portfolio</li><li>Incorporate financially material sustainability factors into organisation's criteria for portfolio strategies to manage financial and/or operational performance</li><li>Incorporate sustainability KPIs (e.g. sustainability ratings, carbon footprint, sustainability integration score, avoided emissions, resource conservation, community development) into evaluation criteria to measure performance with reference to internationally recognised frameworks and standards (e.g. TCFD, ISSB)</li><li>Provide recommendations to enhance the sustainability performance of the portfolio, incorporating understanding on whether investment target's business activities contributed sufficiently to the fund's investment objective and sustainability agenda</li></ul>	●

<sup>a</sup> The projected increase in FTEs are aggregated numbers for the same job role across the different FS sub-sectors.

● Portfolio / Investment / Fund Management

● High augmentation ● Moderate augmentation ● Low augmentation

Critical work function	Additional key job task	Impact on job task
Gather and present information to relevant stakeholders	<ul style="list-style-type: none"><li>When determining sustainability strategies with investors, uphold sustainability stewardship, apply knowledge on taxonomy alignment and sustainable investment objectives (e.g. impact investing, sustainable investing, thematic investing, impact first investing, sustainability alignment, sustainability integration), as well as considerations for key sustainability trends and social/environmental risks, carbon markets, climate change impact, and non-financial industry sustainability developments</li><li>Incorporate information on sustainability-related performance and risk metrics (e.g. taxonomy alignment, sustainability risk rating, SFDR, TCFD, ISSB, MSCI) when preparing and presenting information to relevant stakeholders</li><li>Understand impact measurements when evaluating research findings on financial forecasting and valuation</li></ul>	●
Ensure compliance with investment management guidelines	<ul style="list-style-type: none"><li>Ensure investment portfolios are aligned to sustainability related guidelines and labels (e.g. Ecolabel, SFDR article 8,9, Paris Aligned Benchmarks)</li><li>Keep abreast of new sustainability investment guidelines and ensure that strategies and investment processes are compliant with international standards and best practices</li><li>Work with compliance team to update sustainability-related policies according to new sustainability investment guidelines</li></ul>	●

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

● Portfolio / Investment / Fund Management

Context of change and impact on job tasks

Asset management firms are increasingly creating sustainability-screened or -aligned investment funds and alternative sustainable investment opportunities (e.g. projects generating carbon credits) as sustainability gain prominence in the investment industry. The job role holder will need to adapt to changing investor preferences and regulatory landscapes, and the increasing importance of sustainability factors in investment decision-making

This job role holder will need to incorporate sustainability factors into investment decision-making processes. In order to do so, they will need to define material sustainability targets, metrics and outcomes for the green and sustainability-related investment portfolio. During investor meetings to determine sustainability strategies, this job role holder should uphold sustainability stewardship, apply knowledge on taxonomy alignment and sustainable investment objectives, as well as considerations for key sustainability trends and social/environmental risks, carbon markets, climate change impact, and non-financial industry sustainability developments. They also need to understand and articulate relevant impact measurements and metrics (e.g. taxonomy alignment, sustainability risk rating, MSCI rating) when sharing research findings on financial forecasting and valuation.

Additionally, they need to keep abreast of new sustainable investment guidelines and ensure that investment portfolios are aligned to sustainability related guidelines and labels (e.g. Ecolabel, SFDR article 8,9, Paris Aligned Benchmarks). They should also work with compliance team to update sustainability policies accordingly.

Time horizon of impact: Within the next three years

Projected % increase in FTE (by year)<sup>a</sup>

2025	2027	2032
6%	10%	10%

Impact on key job tasks

● High augmentation ● Moderate augmentation ● Low augmentation

Critical work function	Additional key job task	Impact on job task
Execute strategic decisions and evaluate performance	<ul style="list-style-type: none"><li>Define organisations investment strategies for sustainability alignment, integration and impact investments</li><li>Define material sustainability targets, metrics and outcomes for the green and sustainability-related investment portfolio</li><li>Incorporate financially material sustainability factors into organisation's criteria for portfolio strategies to manage financial and/or operational performance</li><li>Incorporate sustainability KPIs (e.g. sustainability ratings, carbon footprint, sustainability integration score, avoided emissions, resource conservation, community development) into evaluation criteria to measure performance with reference to internationally recognised frameworks and standards (e.g. TCFD, ISSB)</li><li>Provide recommendations to enhance the sustainability performance of the portfolio, incorporating understanding on whether investment target's business activities contributed sufficiently to the fund's investment objective and sustainability agenda</li></ul>	●

<sup>a</sup> The projected increase in FTEs are aggregated numbers for the same job role across the different FS sub-sectors.

● Portfolio / Investment / Fund Management

● High augmentation ● Moderate augmentation ● Low augmentation

Critical work function	Additional key job task	Impact on job task
Gather and present information to relevant stakeholders	<ul style="list-style-type: none"><li>When determining sustainability strategies with investors, uphold <b>sustainability stewardship</b>, apply knowledge on <b>taxonomy alignment</b> and <b>sustainable investment objectives</b> (e.g. impact investing, sustainable investing, thematic investing, impact first investing, sustainability alignment, sustainability integration), as well as considerations for key sustainability trends and social/environmental risks, carbon markets, climate change impact, and non-financial industry sustainability developments</li><li>Incorporate information on sustainability performance and risk metrics (e.g. taxonomy alignment, sustainability risk rating, SFDR, TCFD, ISSB, MSCI) when preparing and presenting information to relevant stakeholders</li><li>Learn and stay up-to-date with trading regulations and best execution policies from various carbon exchanges pertaining to carbon trading</li></ul>	●
Ensure compliance with investment management agreements	<ul style="list-style-type: none"><li>Ensure investment portfolios are aligned to sustainability related guidelines and labels (e.g. Ecolabel, SFDR article 8,9, Paris Aligned Benchmarks)</li><li>Keep abreast of new sustainable investment guidelines and ensure that strategies and investment processes are compliant with international standards and best practices</li><li>Work with compliance team to update sustainability policies according to new sustainable investment guidelines</li></ul>	●

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