

# INTEGRATING ESG IN FUNDAMENTAL AND FINANCIAL ANALYSIS

8 JULY 2021 | 10.00 AM - 12.00 PM

SIDC WEBINAR



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Learning Hours: 2 hours



Fees: MYR 350 (fee is not inclusive of 6% SST)



CPE Points Earned: 5 CPE points (TBC)

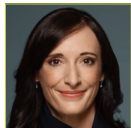
## MODERATOR



**LEE PEI YIN**  
Partner and Malaysia  
Financial Accounting  
Advisory Services (FAAS)  
Leader, Ernst & Young PLT



**MARY LEUNG, CFA**  
Head, Advocacy,  
Asia Pacific CFA Institute



**EMILY WOODLAND**  
APAC Co-Head of Sustainable  
Investing, BlackRock



**SERENA TAN SHIYUN**  
Senior Portfolio Manager and  
Regional Analyst, RHB Asset  
Management Pte Ltd



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## PROGRAMME OVERVIEW

ESG has been thrust further into the spotlight during the pandemic as more investors are getting serious about sustainability, preferring to invest in companies which incorporate Environmental, Social and Governance (ESG) into their business.

Fundamental analysts must now focus on parameters related to ESG, in addition to analysis of macroeconomic factors such as the state of the economy and industry conditions and microeconomic factors such as the effectiveness of the company's management. While it is more common to factor in ESG elements through quantitative analysis, investors and analysts alike find it increasingly necessary to quantify and integrate ESG elements into financial forecasts and company valuation models. This is on top of financial variables from traditional sources of data.

## PROGRAMME OBJECTIVE

This programme will focus on the importance and methodology used in integrating quantifiable and material ESG elements into fundamental and financial analysis, the impact of ESG on forecasting as well as its use in valuation and ways in determining its sources of information.

## ICF COMPETENCY LEVEL

- Functional (Technical) – Fundamental Analysis, Valuation (Proficiency Level 3)
- Foundational (Product) – Capital Market Environment (Proficiency Level 3)

## LEARNING OUTCOMES

Upon completion of this programme, participants will be able to:

- Describe the importance of incorporating ESG factors in fundamental analysis to investors and analysts
- Analyse the impact of incorporating ESG factors in financial forecast
- Explain how integrating ESG factors enhances the research process
- Analyse how the source of information could be identified by asking the right questions

## WHO SHOULD REGISTER?

### Individuals

Investment Analysts, Fund Managers, Capital Markets Services Representative's License Holders, Professionals undertaking corporate advisory work, Sustainability Officers

### Companies

Investment Banks, Stockbroking Firms, Fund Management Companies, Advisory Firms (Research), Private Equity Firms

## WHAT WILL YOU LEARN?

### Why ESG is Now Important in Fundamental Analysis

- Covid-19 impact on investors preferences
- Why ESG factors matter in fundamental analysis?
- ESG as a source of alpha?
- How embedding ESG factors increase long-term shareholders value?

### The Latest in ESG Regulation

- A global overview of ESG regulation
- The impact of ESG regulation on issuers and asset managers
- ESG regulation in Asia Pacific

### What's the Impact of ESG Factors in Financial Forecasts?

- Benefits of analysing ESG risks and opportunities
- ESG integrated research vs metrics driven screening

### How ESG Factors Integrated Strengthens the Fundamental Research Process

- Insights into company's strategic philosophy, operating structure and growth opportunities
- Current obstacles related to ESG investing – lack of standards and comparable data

### Sources of Information

- ESG analysis
- Asking the right questions
- Reliability of ESG data

### Moderator

- Lee Pei Yin** Partner and Malaysia Financial Accounting Advisory Services (FAAS) Leader, Ernst & Young PLT

### Panellists

- Mary Leung, CFA** Head, Advocacy, Asia Pacific CFA Institute
- Emily Woodland** APAC Co-Head of Sustainable Investing, BlackRock
- Serena Tan Shiyun** Senior Portfolio Manager and Regional Analyst, RHB Asset Management Pte Ltd

### Recommended Learning Hours:

2 hours / 5 CPE points (TBC) / Pre & Post Assessments

### Methodology:

Online Polls / Videos / Case studies

## MODERATOR



### LEE PEI YIN

Pei Yin is a Partner and the Malaysia Financial Accounting Advisory Services Leader in Ernst & Young PLT.

She has more than 19 years' experience providing a wide range of assurance and advisory services to clients across sectors such as financial services, power and utilities, telecommunications and real estate.

Pei Yin's experience includes finance transformation projects, accounting standards implementation, finance function audit readiness and remediation projects using technology as an enabler.

## PANELLISTS



### MARY LEUNG, CFA

Mary is Head, Advocacy, Asia Pacific at CFA Institute.

She leads the team that is responsible for building market integrity in APAC by developing and advocating capital markets policy positions that raises investor protection and fosters sustainable industry growth. She also oversees the promotion and development of Asia-Pacific Research Exchange (ARX), a research hub through which we engage with societies, members, governments, regulators, academia and other industry stakeholders to advance the wider CFA Institute mission.

Mary has over 20 years of experience in the global financial industry, having worked in corporate finance, wealth management advisory and fund management. She joined from Coutts & Co, where she was Director of Business Development and Management for North Asia. Prior to that she was Executive Director at UBS AG, where she led the Corporate Advisory Group in Hong Kong. With experience in both the buy- and sell-sides, Mary has a strong understanding of the drivers and dynamics of different investor groups, including institutional investors, corporates, family offices, asset owners, and high net worth individuals.

Mary graduated from Peterhouse, Cambridge with a degree in Engineering. She has been a CFA charterholder since 1997 and speaks English, Putonghua and Cantonese.



### EMILY WOODLAND

Emily Woodland joined BlackRock in April 2021 as the firm's APAC Co-Head of Sustainable Investing. Her team oversees the strategy and implementation of BlackRock's sustainable offerings across the APAC region.

Emily previously served as the Head of Sustainable Investment for Global Public Markets at AMP Capital, and prior to that as Investment Advisor for Asia Debt Management's private credit sustainable investment programs in South East Asia.

Her subject matter expertise in sustainability is grounded in over 16 years of APAC investment management experience with UBS, across several asset classes and investment styles. She began her career in equity and convertible bond trading for UBS Investment Bank, then served as a portfolio manager with the firm's Fundamental Investment Group, and later as a portfolio manager in the long/short multi-strategy hedge fund team within UBS Asset Management.

Emily, originally from the UK, has lived in Hong Kong since 2003. She holds a Bachelor's Degree in Financial & Business Economics from the University of Newcastle-upon-Tyne, a Masters Degree in Corporate Environmental Governance from the University of Hong Kong, and is a CFA Charterholder.



### SERENA TAN SHIYUN

Serena Tan joined RHB Asset Management Pte. Ltd. in June 2018 as a senior regional analyst responsible for financials sectors and as an Asia portfolio manager. Serena has more than 11 years of experience working in the investment

industry. Prior to joining the team, she spearheaded research efforts at a sustainable investment consultancy and has co-published numerous reports on climate change and sustainable investments. Serena was also a portfolio manager at Nomura Asset Management where she was responsible for managing Asian equities for both institutional and mutual fund clients. Serena Tan holds a Master of Science in Global Finance from the Hong Kong University of Science and Technology and the New York University Stern School of Business. She also holds a Bachelor in Engineering from the National University of Singapore. Serena is a CFA charterholder.

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