The candidate should be able to:

* 7.1.1 explain the aims and objectives of integrating ESG into the investment process
* 7.1.2 describe different approaches of integrating ESG analysis into the investment process
* 7.1.3 describe qualitative approaches to ESG analysis across a range of asset classes
* 7.1.4 describe quantitative approaches to ESG analysis across a range of asset classes
* 7.1.5 identify tangible and intangible material ESG-related factors through both qualitative and quantitative approaches
* 7.1.6 describe how scorecards may be developed and constructed to assess ESG factors
* 7.1.7 assess ESG issues using risk mapping methodologies
* 7.1.8 explain how ESG complements traditional financial analysis
* 7.1.9 analyze how ESG factors may affect industry and company performance
* 7.1.10 analyze how ESG factors may affect security valuation across a range of asset classes
* 7.1.11 interpret a company’s disclosure on selected ESG topics
* 7.1.12 apply the range of approaches to ESG analysis and integration across a range of asset classes
* 7.1.13 describe the challenges of undertaking ESG analysis across different geographic regions and cultures
* 7.1.14 describe the challenges of identifying and assessing material ESG issues
* 7.1.15 describe the challenges of integrating ESG analysis into a firm’s investment process
* 7.1.16 explain the approaches taken across a range of ESG integration databases and software available, and the nature of the information provided
* 7.1.17 identify the main providers of screening services or tools, similarities and differences in their methodologies, and the aims, benefits and limitations of using them
* 7.1.18 describe the limitations and constraints of information provided by ESG integration databases
* 7.1.19 describe primary and secondary sources of ESG data and information
* 7.1.20 describe other uses of ESG and sustainability systems data
* 7.1.21 explain how Credit Rating Agencies (CRAs) approach ESG Credit Scoring