The candidate should be able to:

* 9.1.1 explain why mandate construction is of particular relevance and importance to the effective delivery of ESG investing: linking sustainable investing to the mandate; defining the sustainable investment strategy
* 9.1.2 explain how ESG screens can be embedded within investment mandates/portfolio guidelines to generate investment returns and manage portfolio risk
* 9.1.3 explain the most common features of ESG investing that asset owners and intermediaries, including pension consultants and fund selectors, are seeking to identify through request for proposal (RFP) and selection processes: voting, engagement, examples of decision making, and screening process
* 9.1.4 explain the different client types and their objectives which influence the type of ESG investing strategy selected
* 9.1.5 explain the key mechanisms for reporting on and monitoring performance and mandate alignment with client objectives
* 9.1.6 explain the key challenges in measuring and reporting ESG-related investment performance: active, passive, and smart beta approaches; performance attribution; sensitivity analysis; risk measurement; engagement activity/impact; and integrated reporting and investment review