



# CORE SUSTAINABLE FINANCE TECHNICAL SKILLS & COMPETENCIES (TSCs) FOR PRIVATE BANKING RELATIONSHIP MANAGEMENT (PB RM)



## PROFICIENCY LEVEL 3 ACROSS THE FOLLOWING TSCs:



SUSTAINABLE INVESTMENT MANAGEMENT



CARBON MARKETS & DECARBONISATION STRATEGIES MANAGEMENT



NON-FINANCIAL INDUSTRY SUSTAINABILITY DEVELOPMENTS



CLIMATE CHANGE MANAGEMENT

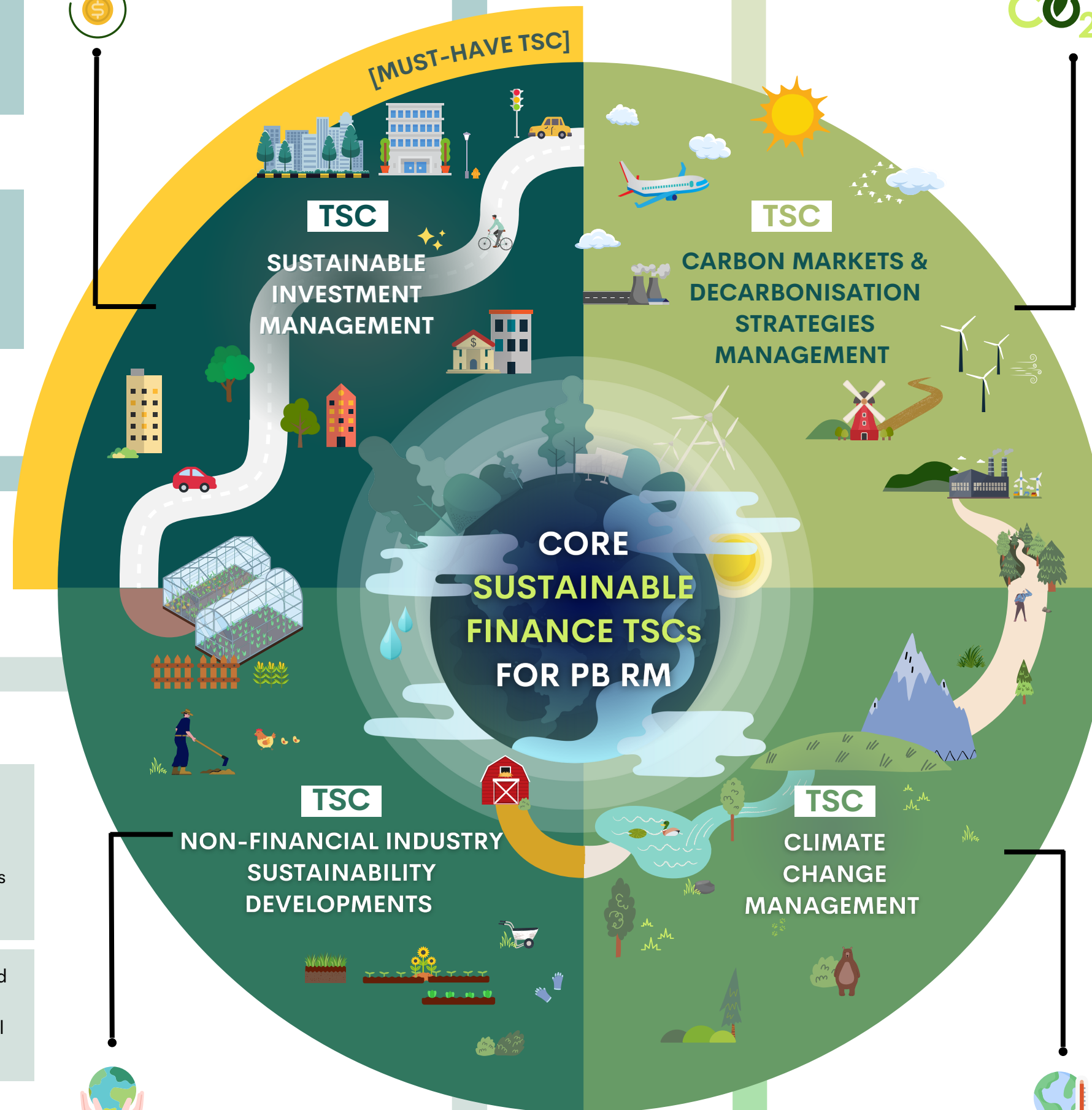
### KNOWLEDGE AREAS

Key sustainable investment strategies or investment approaches & governance practices	Sustainable asset classes universe	Approaches to take into account sustainable factors in investment process
Sustainable investment trends including new approaches & challenges	Sustainable investment principles & best practices	Leading global & regional sustainable investment initiatives, coalitions & pledges

### ABILITIES

Explain different sustainable investment approaches & its application to the organisation's portfolio strategies to customers	Identify the appropriate sustainable investment concepts that can be applied together, & which may be contradictory	Research & support the inclusion of sustainability factors in the portfolio construction process
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Understand & explain the application of sustainable investment concepts, principles & practices to the products & services offered by the organisation



Understand & explain key carbon market & pricing developments relevant to the organisation & how they fit with the organisation's goals



### KNOWLEDGE AREAS

Key climate-related policy concepts & leading government & corporate commitments driving carbon markets	Definition of carbon credits as well as the different attributes & qualities	Key greenhouse gas (GHG) accounting approaches & principles for financial institutions
Compliance & voluntary carbon markets, carbon pricing mechanisms & policy considerations	How mitigation hierarchy approaches & benefits of carbon trading allows efficient allocation of capital	Global carbon markets

### ABILITIES

Identify key carbon related goals e.g. net zero, carbon neutral	Explain difference between voluntary & compliance carbon markets	Identify opportunities for organisations to participate in carbon markets
Explain key carbon market & pricing developments & how these fit with the organisation's goals to relevant stakeholders		

### KNOWLEDGE AREAS

Key international & regional regulatory sustainability developments in the non-financial industries	Key trends, issues, challenges on domestic, regional & international sustainability & their risk/opportunity relevance to client's industries	Alignment between key sustainability risks & opportunities in relevant industries, & global ambitions
Technology & business model developments that support climate mitigation, adaptation & transition or address other sustainability issues and/or client industries	Policies & practices to embed sustainability risks & opportunities in non-financial organisations	

### ABILITIES

Explain key sustainability trends & social/environmental risks in non-financial industries to stakeholders	Engage customers on their key sustainability related dependencies, impacts, risks & opportunities in the non-financial industries
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Understand & explain key domestic, regional & international sustainability developments, risks & opportunities in the relevant non-financial industries & their impact to the financial sector



### KNOWLEDGE AREAS

Basic climate science concepts	International agreements & frameworks on climate change	Concepts of climate reporting frameworks, guidelines & principles
Types of economic & market risks, which includes physical risk & transition risk, & opportunities arising from climate change	Key sources of climate risks & potential transmission channels through which they can impact & be impacted by the financial sector performance of the organisation or materially impact sustainability factors	

### ABILITIES

Basic climate science concepts	International agreements & frameworks on climate change
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Understand & explain key climate change concepts, principles & risk management issues relevant to the organisation's activities

