

☺ Certification AMF Sustainable Finance, exam for students

We have set up a digital platform to prepare you for this certification, which could prove very useful in terms of employability.

Our support is made up of high-performance, comprehension-oriented teaching tools. A number of tools are at your disposal: an e-learning course, a question practice platform, online exam registration and mock exams.

PEOPLE CONCERNED

Students aiming at getting an additional certification on sustainable matters linked to financial products and issues.

Objectives

- Obtain a general understanding of the institutional and economic framework of sustainable finance
- Acquire a reading grid of the products and methodologies used
- Offer products tailored to customer needs and preferences
- Pass the exam questions

The AMF-certified Sustainable Finance exam for students aims to acquire knowledge on the institutional and economic framework of sustainable finance, understand the essential concepts and acquire a reading grid of the products and methodologies used to propose products adapted to the needs of customers.

EXPRESS PACK STUDENT

3-month acces
to the AMF Sustainable Finance
Training platform



3 mocks exams



1 final exam session

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Exam and training tools

- The duration of the exam is one hour ½ maximum.
- The exam is made of 60 questions (out of a 760 questions total data base).
- Three answers available per question, only one correct answer, one good answer = one point.
- There is no negative point on a wrong answer.
- The success rate is of 80% correct answer.
- A careful and regular monitoring of the digital modules will makes it much easier to pass the final evaluation test.
- Summary sheets are available to secure knowledge.

Certification program

Main concepts of sustainable finance

Initial warning that the concept of sustainable finance is under construction : multiplicity of terms, multiplicity of approaches, multiplicity of expectations.

- Frequently used terminology and meaning: CSR, ESG, SRI, other concepts, etc.
- UN Sustainable Development Goals (SDGs),
- State commitments under the Paris Agreement.
- The European Commission's strategy for sustainable finance.
- The sustainable finance ecosystem and stakeholders, including non-financial research and non-financial actors (international organizations, NGOs, etc.).

The french and european regulatory framework

Harmonization and increased transparency:

- The principles of the European Disclosure Regulation.
- Core concepts: sustainability risks, negative sustainability impacts, sustainable investment categories.
- Applicable approach to products and players.

Sustainability from an environmental perspective:

- European regulation taxonomy: principles, impacts for companies and future developments expected on the social aspect.
- The European green bond market and standards.
- The impact on existing European and French regulations: MiFID, UCITS and AIFM provisions.

The changes in regulation related to indices (Benchmark Regulation):

- The new «PAB» and «CTB» indices, the notion of a «decarbonization» trajectory,
- Strengthening transparency requirements for benchmarks regarding the inclusion of ESG criteria in their methodology.
- The inclusion of ESG criteria in the mission and activities of agencies

Companies and non-financial actors: environmental, social and governance issues

- Introduction: the double materiality - impact of the company on the environment and impact of the environment on the company.
- The components and characteristics of CSR: Environment, Social, Governance.
- Information to be provided by European companies: the extra-financial performance statement.
- French specificities: the duty of vigilance, Sapin II (corruption component), the raison d'être (mission-driven companies).
- Rating and extra-financial research: quality of information, «extra-financial» rating agencies, different scoring approaches and extra-financial ratings.

The non-financial criteria approaches in the asset management sphere

- Management approaches: ESG integration, exclusions, Best in Class, Best in Universe, green bond funds, impact funds, thematic approach (example: transition, climate, social inclusion etc.)
- French AMF doctrine on the materiality and commitment of the extra-financial approach (position-recommendation 2020-03).
- The voting and engagement policy of management companies and their influence in corporate governance.

Marketing products related to sustainable finance

- National and European labels, their characteristics and their differences: Greenfin, ISR, European Ecolabel, Finansol...
- Consumer appetite and objectives for sustainable finance: MiFID 2 and ESG preferences in the suitability test, reminder of performance characteristics and components, distinction between financial and non-financial objectives in the expectations of the customer/in the characteristics of the products offered etc..
- AMF doctrine on promotional communication on sustainable finance to prevent greenwashing (position-recommendation 2020-03): objectives and principles, centrality of communication, product categories and the notion of "significant commitment".
- Social and solidarity finance