

Investment Professionals Need to **Invest in New Skills** to Be Successful

Investment Roles are **Evolving**

More than **1/3** of CFA Institute members surveyed believe the role they perform will be substantially different in **5-10 years' time**.



Changes to Investment Roles will Occur Due to **Industry Disruptors**

- New **analytical methods**, including artificial intelligence and machine learning
- Increased focus on **sustainability**
- Changing **regulatory** requirements
- Fee pressure
- **Expanded datasets**, including alternative and unstructured data
- **Client expectations** for new products, customization, and increased reporting
- **Hybrid** working model
- Increased focus on **diversity, equity, and inclusion**
- Changes in **company funding approaches/structures** (private assets, SPACs, etc.)



Therefore, **New Skills** are Needed

91% said it is important for them to actively develop **new professional skills** to further their career.



Where Investment Professionals Want to **Focus Time Learning**

- 70%** Sustainability
- 64%** Artificial Intelligence and Machine Learning
- 64%** Soft Skills
- 61%** Climate Risk
- 50%** DeFi/Blockchain



Putting Learning to Work to Make **Smarter Decisions**

Members believe these sources of information will be **“more important”** in the future for investment decision making.

- Sustainability ratings **76%**
- Alternative data sources (social media, web scraping, credit card data, etc.) **72%**
- Proprietary, in-house metrics **50%**
- Your professional network **43%**
- Market sentiment indicators **33%**
- Independent research providers **31%**
- Large financial market data vendors (e.g., Bloomberg, FactSet) **23%**
- Companies' financial statements **13%**
- Credit ratings **10%**

