

Investment Professionals Need to Invest in New Skills to Be Successful

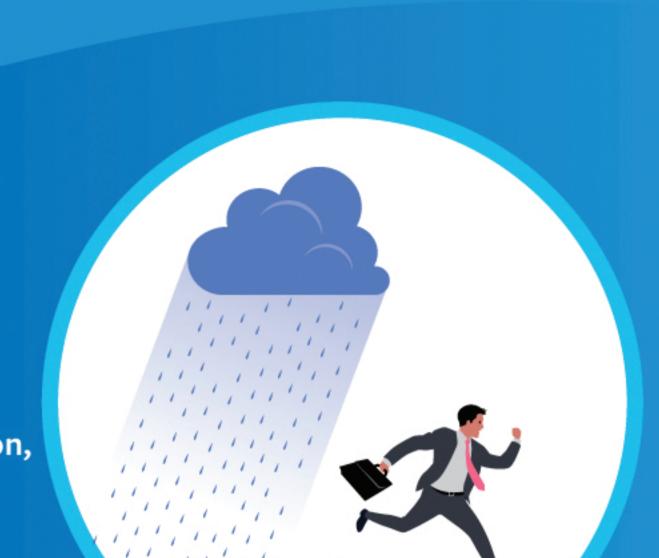
Investment Roles are Evolving

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

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 **1** 76%

Alternative data sources (social media, web scraping, credit card data, etc.) 72%

Proprietary, in-house metrics **1** 50%

Your professional network **1** 43%

Market sentiment indicators **(1)** 33%

Independent research providers **()** 31% Large financial market data vendors (e.g., Bloomberg, FactSet) 23%

Companies' financial statements

Credit ratings / 10%

