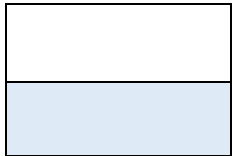


## Continuing Professional Education Objectives – Institutional

Legend:



DSI Institutional Investment Information Provider



DSI Institutional Investment Advisor

Topic	Subject	Learning objective
<b>1. Product</b>	<b>1.1 Sustainable and responsible investing</b>	1.1.1 The candidate can identify the current developments pertaining to the Sustainable Finance Disclosure Regulation (SFDR).
		1.1.2 The candidate can identify the consequences of legal verdicts in the area of sustainability (such as the Shell verdict) for exchange-listed enterprises, and describe the impact of these consequences on investments in these enterprises.
		1.1.3 The candidate can describe the possible consequences of the EU Fit for 55 plan for a variety of sectors, and their impact on investments in these sectors.
		1.1.4 The candidate can describe the most important climate and sustainability goals of authoritative international organisations, such as the United Nations and the European Union.
		1.1.5 The candidate can describe the impact of international organisations' goals on an institutional investment portfolio.
<b>2. Market</b>	<b>2.1 Risks</b>	2.1.1 Taking current events into consideration, the candidate can describe the possible consequences of dramatic increases in inflation on the portfolio, with attention to the duration and impact on interest rates.
		2.1.2 Taking the state of the economy into consideration, the candidate can list the extra risks for specific investment categories as a result of dramatic increases in valuation and low interest rates.
	<b>2.2 Monetary developments</b>	2.2.1 The candidate can provide a general summary of current ECB policy.
		2.2.2 The candidate can describe which impact the current ECB policy has on clients' investment portfolios.

Topic	Subject	Learning objective
<b>3. Legislation and regulations</b>	<b>3.1 Current developments</b>	3.1.1 The candidate can list the supervisory issues for AFM and DNB, and describe current developments pertaining to these topics.
		3.1.2 The candidate can explain the influence that current developments from learning objective 3.1.1 have on day-to-day advisory practice.
<b>4. Client</b>	<b>4.1 Integrity of financial markets</b>	4.1.1 The candidate can provide a general description of the consequences of violations of financial integrity for financial enterprises, based on recent real-world examples.
		4.1.2 When in doubt about the integrity of a client, the candidate can describe which course of action to take and estimate the consequences for the services provided.
<b>5. Current developments</b>	<b>5.1 Current events</b>	5.1.1 The candidate can describe the current developments that pertain to topics in the DSI learning goals.
		5.1.2 The candidate can explain the current developments that pertain to topics in the DSI learning goals in the context of an institutional investment portfolio.
		5.1.3 The candidate can describe the current developments in the field of cryptocurrency.

Additional instructions for trainers:

- The programme presents opportunities for the candidate to display mastery of the skills described in the document 'DSI skills learning goals'.
- At least 10% of the study load should consist of demonstrating or testing skills proficiency.