



SFDR Awareness

In March 2021, the first requirements of the Sustainable Finance Disclosure Regulation (SFDR) came into effect. The goal of this comprehensive set of rules? To improve transparency in the market for sustainable investment products and to help investors make informed choices.

The SFDR imposes many complex requirements on financial market participants in terms of disclosures. What is the difference between Article 8 and 9 products and what does light green and dark green mean? What does the term PAI refer to? And to what extent can investors trust that the information they receive is accurate?

In this course, we introduce you to the SFDR. Upon completion, you will understand the context in which this regulation was developed and you will be familiar with the requirements that apply to your organisation.

Target audience

From investment firms to pension funds: many financial organisations fall within the broad scope of the SFDR. Given the large impact, knowledge of the SFDR and its key concepts and obligations is important for all professionals working at financial market participants.

For investors who want to contribute to a sustainable future, it is important to fully understand the purpose, obligations and concepts of the SFDR.

In your selection process, you will come across investments with appealing claims for sustainability. The SFDR helps you make good choices in this area.

Objective

This e-learning teaches you the outlines and context of the SFDR. Upon completion, you will be able to:

- Outline the ESG developments within the European Union that form the basis for the SFDR;
- Describe the purpose, structure, scope and monitoring of compliance with the SFDR;
- Distinguish key concepts from the SFDR such as sustainable investment, sustainability factors and sustainability risks;
- Name the disclosure requirements deriving from the SFDR;
- Describe what Principal Adverse Impacts (PAIs) are and how financial organisations should deal with them;
- Describe classification and disclosure obligations at the product level;
- Outline other ESG-related regulations.



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Education level

This e-learning is a course at HBO (higher vocational education) level. We assume that participants already have some prior knowledge of the financial sector.

This training is a logical step to gain more knowledge after following our ESG Awareness training, which only briefly discusses the SFDR.

Course content

Baseline measurement

This awareness training starts with a baseline measurement to determine whether you can go straight to the test or better study the theory first.

Theory

- **Context of the SFDR:** including Sustainable Development Goals, United Nations Principles for Responsible Investment, EU course of action regarding ESG, Taxonomy Regulation, etc.
- **Introduction into the SFDR:** purpose, legal framework, technical standards, level II, scope, compliance monitoring and key concepts.

- **Disclosure requirements:** entity-level disclosure requirements, integration of sustainability risks in investment policy, negative sustainability impacts, product-level disclosure requirements and Taxonomy Regulation and SFDR.
- **Other rules and initiatives:** including integration of ESG considerations in delegated regulation, Non-Financial Reporting Directive (NFRD), Pensions Act, Shareholder Engagement Directive, the IMVB for pension funds and the IMVO Covenant.

Study load

The SFDR Awareness training can be taken via our online learning environment, wherever and whenever it suits you. The training takes between one and two hours to finish, depending on your prior knowledge about the subject.

Want to know more?

You can find more information about the [SFDR Awareness e-learning](#) on our website. You can also [request a demo](#) to get a preview of the e-learning.

