

Symposium 2 - Using Big Data Analytics and AI to Generate ESG Intelligence for Investment Opportunities

Under the ITF project (GSP/033/22): Fostering Big Data Applications and Innovation to Reflect Corporate ESG Performance through Media and Social Listening, the Research Centre for ESG (CESG) is hosting this fourth event related to Big Data x ESG.

Light lunch will be provided for all participants during session break

A Certificate of Attainment will be granted for each of the sessions. Only participants who physically attend the session will receive a certificate. Accreditation of CPD points/hours is subject to the final decision of respective organisations.

In this symposium, we will demonstrate how to use the ESGi-Composite Scorecard to generate intelligence to support decision making for investment analysis and other business functions. The symposium should be valuable to various ESG stakeholders from investment, accounting, corporate communications, ESG consulting, NGOs, government bodies and IT sectors.

Date	Venue	Time
12 Jun, 2024 (Wed)	Rm 1101-02, 11/F, Excellent Global Office, Euro Trade Centre, 13-14 Connaught Rd, Central	Session One: 10:30am-12:45pm Light lunch: 12:45-1:45pm Session Two: 1:45-4:00pm

To register: <https://forms.office.com/r/RP3SdtTFdP>

Deadline for registration is 8 Jun, 2024. The symposium is divided into two sessions. Participants are welcome to join either session or both.

Hybrid Mode

Target audience	Key takeaways
Investment	Demonstrate how to use ESGi-Composite to form investment portfolios and showcase their performance attributes, such as alpha and risk reduction.
Communication	Discuss how sentiment indicators in the Scoreboard can be used to formulate IR and corporate communication strategies.
Accounting	Demonstrate a simple method to evaluate ESG disclosure performance of listed firms in Hong Kong (the APE Score).
Consulting	Demonstrate how to use the Scoreboard data for ESG consulting.

Funding Organisation:



Event Partner



Event Promotion Organisations



Supporting Organisations:



Strategic Partners



SESSION ONE

Session 1 registration (10:30-10:45am)

1. Opening remarks (10:45-11:15am):

How to Use the ESGi-Composite Scorecard to Generate Intelligence for Investment Analysis

Speaker: **Prof Louis Cheng**, Dr S H Ho Professor of Banking and Finance, Director of Research Centre for ESG, HSUHK

2. Panel one on communication: (11:15am-12:00nn):

Managing Media and Social Media for ESG Issues

Moderator: **Dr Liane Lee**, Assistant Professor of Marketing, HSUHK

Panel members: **Ms Luna Fong**, General Manager - Investor

Strategy & Communications, Shui On Land Limited

Ms Sophia Wong, Head of Corporate

Communications and Sustainability, Champion REIT

3. Panel two on investment: (12:00nn-12:45pm):

How Financial Intelligence Can Be Generated from ESG Data

Moderator: **Prof Louis Cheng**, Dr S H Ho Professor of Banking and Finance, Director of Research Centre for ESG, HSUHK

Panel members: Representative from an international ESG data provider

Mr Frank Tsui, Managing Director, Head of ESG Investment, Value Partners Group

Light lunch and networking (12:45-1:45pm)



Contact Us:
esgevents@hsu.edu.hk

<https://www.bigdata-esg.com/>



SESSION TWO

Session 2 registration (1:45-2:00pm)

4. Opening remarks (2:00-2:30pm):

How to Use Climate Data to Generate Financial Predictions

Speaker: **Ms Vivi Hu**, CEO, YoujiVest

5. Panel three on accounting: (2:30-3:30pm):

Relating Financial Disclosure and ESG Disclosure: A Double-materiality Issue

Moderator: **Dr Jerry Cao**, Associate Professor of Economics and Finance, HSUHK

Panel members: **Mr Hauman Yeung**, Director of Sustainability, Ascent Partners

Mr Cyrus Cheung, Partner, ESG Services, PwC

Mr Harry Yan, Partner, Risk Advisory, Deloitte

6. Closing remarks: (3:30-4:00pm):

Opportunities and Challenges on Consulting for ESG/Climate Change

Speakers: **Prof Louis Cheng**, Dr S H Ho Professor of Banking and Finance, Director of Research Centre for ESG, HSUHK

End of event



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Disclaimer: Any opinions, findings, conclusions or recommendations expressed in this material/event (or by members of the project team) do not reflect the views of the Government of the Hong Kong Special Administrative Region, the Innovation and Technology Commission or the Vetting Committee of the General Support Programme of the Innovation and Technology Fund.



Prof Louis Cheng
Dr S H Ho Professor of Banking and Finance
Director of Research Centre for ESG
HSUHK

Dr Cheng is the Dr S H Ho Professor of Banking and Finance at the Hang Seng University of Hong Kong. He is a member of the Hospital Governing Committee of Ruttonjee & Tang Shiu Kin Hospitals (April 2023 – March 2026). He was a member of the Investment Committee of the Hospital Authority Provident Fund Scheme (2016-2022) in which he led the effort in promoting ESG integration for the investment portfolio. Dr Cheng actively engages in ESG and green finance research. In addition to publishing on Green Bond, he received various research donation and grants related to ESG and financial services for a total exceeding HKD8mil. He is also a coauthor of a book chapter titled “Fintech Unicorns” in The Palgrave Handbook of Fintech and Blockchain, 2021.

Dr Cheng is a member of the Business Studies Assessment Panel for Competitive Research Funding Schemes for the Local Self-financing Degree Sector under the Research Grants Council (RGC). He also served as a member of the Business Studies Panel (Joint Research Schemes) for the RGC, Solicitors Disciplinary Tribunal Panel, and University Council and Trustee Board of the Hong Kong Polytechnic University Pension Fund. He is currently a member of the Examination Board of The Institute of Financial Planners of Hong Kong (IFPHK).

Dr Cheng graduated with a DBA in Finance from Louisiana Tech University in 1989. He has been a CFPCM certificant since 2001. Before joining Hang Seng University, he was Professor of Finance and Director of Economic Sustainability and Entrepreneurial finance at PolyU. From 1989 to 1998, he was an Assistant Professor and then Associate Professor at Murray State University in Kentucky. In 2003, he served as the HSBC Fellow at the University of Exeter in UK. Moreover, He has over 100 articles and books published including the Journal of Finance. Dr Cheng is an author of Fundamentals of Financial Planning, and the lead author of Financial Planning and Wealth Management: An International Perspective, both by McGrawHill.

Dr Cheng served as a project consultant for various organizations including United Nations, Bank of China (HK) Private Banking, Investor Education Centre (IEC), Securities and Futures Commission (SFC), Mandatory Provident Fund Scheme Authority (MPFA), Value Partners, Agricultural Bank of China (HK) Private Banking, Bank Consortium Trust Hong Kong, Fubon Bank, Hong Kong Exchanges (HKEx), Charles Schwab (US), Tai Fook Securities, and Hong Kong Securities and Investment Institute (HKSI).

SPEAKERS



Dr Liane Lee
Assistant Professor of Marketing
HSUHK

Dr Liane Lee has 15 years of senior management experience in product management and large-scale strategic project experiences. She had worked in HSBC and Standard Chartered Bank (HK) Limited in Personal, Small Medium Enterprise and Private Banking segments. Dr Lee represented HSBC in the launch of Renminbi and Deposit Protection Scheme with Hong Kong Monetary Authority. Her last post was Chief Operating Officer of a mining company based in the Asia Pacific region. Dr Lee had developed a strategic research agenda in four specific areas of guanxi (relationship management), stakeholder engagement, financial and CSR communications with publications in International Marketing Review, Journal of Business Research and Public Relations Review.

SPEAKERS



Ms Luna Fong
General Manager - Investor Strategy & Communications
Shui On Land Limited

Luna Fong is currently the General Manager – Investor Strategy & Communications of Shui On Land Limited. Luna has extensive experience in accounting, finance, investor relations and corporate strategy. Prior to joining Shui On Land Limited, she worked as the Head of Investor Relations of Link REIT. She also worked as Corporate Finance Manager at Esprit Holdings Limited, Senior Manager in Financial Planning & Analysis at Sino Land Company Limited and Senior Manager in Assurance at PricewaterhouseCoopers. Luna holds a Bachelor of Commerce from the University of British Columbia. She is also a member of the American Institute of Certified Public Accountants and Hong Kong Institute of Certified Public Accountants.

SPEAKERS



Ms Sophia Wong
Head of Corporate Communications and Sustainability
Champion REIT

Sophia is responsible for leading Champion REIT's internal and external communications, including public relations, sustainability and community engagement, with 20 years of experience in the field. Sophia has been instrumental in devising Champion REIT's sustainability strategy, including the establishment of 2030 ESG targets in alignment of SDGs of United Nations. Over the years, she has developed strong passion in sustainability especially green and wellness initiatives. These efforts have led to several top honours of the Trust, including Hong Kong Sustainability Grand Award from The Hong Kong Management Association and the first-in-Hong Kong Triple Platinum certifications for existing building.

SPEAKERS



Ms Michele Leung
Executive Director
Head of Greater China ESG & Climate
MSCI

Michele Leung is an Executive Director, Head of Greater China ESG & Climate in MSCI. Based in Hong Kong office, she leads the ESG business in Greater China. With over 18 years of investment experience, Michele has extensive product knowledge across different asset classes and promoted sustainability investing to institutional investors in Asia.

Prior to joining MSCI, Michele has held previous roles at S&P Trucost, Hang Seng Indexes, S&P Dow Jones Indices, JP Morgan Private Bank, China International Capital Corp and HSBC Broking Services.

Michele is a certified FRM and ESG Analyst® (CESGA). She holds a BSc in Civil engineering from the University of British Columbia in Vancouver, a Bachelor of Laws from Manchester metropolitan University, a Master of Science in Investment Management from the University of Science & Technology in Hong Kong, and Graduate Diploma in English & Hong Kong Law.

SPEAKERS



Mr Frank Tsui Managing Director Head Of ESG Investment Value Partners Group

Mr. Frank Tsui is a senior member of the Investment Management Team at Value Partners Group.

As the Head of ESG Investment and the Chairperson of the ESG Committee, Mr. TSUI is responsible for leading the Group's Responsible Investing policy, integrating ESG factors into the investment process, building and maintaining the proprietary ESG assessment framework, ESG research, stewardship and engagement, product development as well as nurturing sustainability culture internally and externally.

Started his career in 2001, Mr. TSUI has extensive experience in asset management, wealth management and corporate banking sectors. Mr. TSUI joined Value Partners in September 2015 as a Fund Manager, and was promoted to Senior Fund Manager in 2019. Being the key member to establish the Group's Responsible Investing policy since 2017, he was appointed as the Head of ESG Investment in November 2020.

Prior to joining Value Partners, he was a Director at UBS Wealth Management responsible for portfolio management for ultra-high-net-worth investors. Before joining UBS, he was a Vice President with Merrill Lynch Global Wealth Management where he was responsible for managed products and equities advisory for North Asia business. Earlier, he was the Head of Investment Centre, Direct Business at J.P. Morgan Asset Management.

Mr. TSUI graduated from the Max M. Fisher College of Business of The Ohio State University in the United States with a Bachelor's degree in Finance and Economics.

SPEAKERS



Ms Vivi Hu
CEO
YoujiVest

Vivi Hu is the co-founder and CEO of YoujiVest and serves as the Director of the Carbon Neutrality Lab at the Tsinghua Cross-strait Research Institute and Deputy Director of ESG Special Committee of China Enterprise Management Research Association. An early advocate of ESG (Environmental, Social, and Governance) and sustainable investment since 2012, she has been at the forefront of developing ESG investable products and analytics for global asset managers, with recent expansions focusing on AsiaPac managers. She is nominated as the 10 finalists of 2023 UBS global Female Founder award.

Prior to the inception of YoujiVest, Ms. Hu held various roles at top-tier financial institutions. Her roles included serving as the Director of Product Sales for AsiaPac at the London Stock Exchange, Head of Fund Rating for AsiaPac at Lipper, and Sales Director for the Greater China Region at FactSet. Starting in 2021, Ms. Hu has spearheaded the collaboration with the University of Hong Kong (HKU) and the Shanghai Advanced Institute of Finance to develop China's inaugural investment-centric, ISSB-aligned climate risk model.

Ms. Hu holds a Master's degree in Financial Engineering from Durham University and a Bachelor's degree in Economics from Fudan University.

SPEAKERS



Dr Jerry Cao
Associate Professor of Finance
HSUHK

Currently associate professor of finance at Hang Seng University of Hong Kong. Dr Cao graduated from Boston College with PhD degree in finance under supervision by Professor Josh Lerner from HBS. He is an expert in finance, innovation and entrepreneurship and has grown new interest in Fintech and Quant trading. Dr Cao currently serves as associate editor for Economic Modelling and editorial board for Frontier in Artificial Intelligence and regularly guest editor for Pacific Basin Finance Journal. His publication records include over 20 papers including ones in JFE, MS, JFQA, JCF and JBF. Dr Cao receives many awards including best paper in FMA and academic conferences. Dr is also recipient of Lee Foundation Fellow in Singapore and MAS appreciation award for being a regular speaker at Finance Literacy Education for the Singapore government.

SPEAKERS



Mr Hauman Yeung
Director, Sustainability
Ascent Partners

Hauman has been involved in the environmental movement in Hong Kong since 1988. He was the Executive Director of Green Power, and managed several environmental projects funded by UNEP from 1993 to 1995. He started an eco-village with the South China Agricultural University in 1995. He worked in a private equity investment company, LESS Limited, that invested in Environmental projects in China from 2004 to 2008. During his working in the private equity fund, he helped to set up the whole investment criteria and standard, and also responsible for deal sourcing, due-diligent, closing deal and ongoing monitoring to improve the standard of the portfolio companies.

He is now heading the ESG team in Ascent Partners and have served more than 50 listing companies in Hong Kong to develop their ESG report.

Specialties: Extensive Environmental industrial knowledge 20 years of experience in Working with Chinese Entrepreneur and government body



Mr Cyrus Cheung
Partner, ESG Services
PwC

Cyrus is a Partner with over 17 years of experience in the Assurance and Environmental, Social and Governance (“ESG”) Services practices of PwC Hong Kong. He has extensive experience in assurance, capital market transactions, accounting advisory, internal control advisory, corporate governance advisory, risk management advisory and ESG advisory.

Cyrus has broad assurance experiences for companies in different scale, from start-up company to blue-chip conglomerate listed companies. Cyrus has involved in initial public offering for 10+ companies, including Budweiser which was the HK second-biggest fund-raised IPO in 2019, and multiple merger and acquisition transactions for the clients in Hong Kong, Mainland China and overseas.

Cyrus also specialises in sustainability advisory, corporate governance, risk management, internal controls and assurance. He helps clients to adopt reporting frameworks such as Global Reporting Initiatives (GRI) and the ESG Guide issued by the HKEX. He provided clients with solutions and recommendations on ESG risk assessment framework, governance structure and control procedures. Cyrus also has extensive experience in assisting the companies to formulate ESG strategy and set relevant KPIs, grasping the green and sustainable finance opportunities, conducting stakeholder engagement and materiality assessment, improving the companies ESG performance / ratings (e.g. MSCI, Dow Jones Sustainability Index, CDP), and conducting ESG data assurance.

Cyrus has delivered 100+ professional training and advice on sustainability to the companies from various sectors, including real estate, infrastructure, construction, conglomerates, ports operations, logistics and others.

Apart from working experience, Cyrus is also keen on supporting the young generation. He is the mentor at the Hong Kong Polytechnic University and CPA Australia, and member of Junior Chamber International Hong Kong.

Qualifications and Membership:

- Certified Public Accountant (CPA) in Hong Kong Institute of Certified Public Accountants (HKICPA) and Fellow of CPA Australia.
- Deputy Chairman of Sustainability Committee of HKICPA.
- Deputy President and Chairman of ESG Committee of CPA Australia, Greater China Division
- Member of Advisory Committee on Accounting and Finance of the Hong Kong Polytechnic University
- Member of the Advisory Board for Master of Science in Environmental, Social, and Governance Management of the Lingnan University

SPEAKERS



Mr Harry Yan
Partner, Risk Advisory
Deloitte

Mr Harry Yan is a senior accounting, finance, risk and sustainability professional with over 16 years' experience. He has extensive experience in assisting corporate clients across different countries to navigate their financial and ESG reporting, technical accounting, capital markets (including green/sustainable finance) and internal control challenges. He has worked in different countries including Hong Kong, mainland China, US and Australia with experience and skills in managing complex projects with global teams under tight deadline.

Key areas of specialization:

- Commodities market / ESG / carbon trading
- Life insurance companies
- Investment banking and private equity
- Cross-border IPO, debt issuance and internal controls
- Green finance, climate risk and sustainability reporting
- Fintech