



Symposium 1 - Creating Financial Intelligence from ESG Rating and Sentiment: A Big Data Application for Hong Kong Listed Firms

Under the ITF project (GSP/033/22), the Research Centre for ESG (CESG) has hosted two seminars on Big Data x ESG in 2023. We are pleased to announce the third event under the ITF project: A symposium on creating useful financial intelligence from ESG rating and sentiment.

Hybrid Mode

To register: <https://forms.office.com/r/BYQMz93tAT>

Deadline for registration: 5pm, 18 Mar 2024 (Mon)

The symposium is divided into two sessions. Participants are welcome to join either session or both. A Certificate of Attendance will be granted for each of the sessions.

In this event, we will strengthen the application value for business professionals on interpretation of ESG performance for listed firms using big data and AI tools. Specifically, the following targeted audiences should attend.

Who should attend?	Relevant topics	Speakers
Investment and wealth management professionals	1) Alpha generation by Vivi using ESG sentiment and climate data 2) ESG integration and SDGs disclosure for wealth management practices	Vivi Hu & Chris Tse
Accounting professionals	How to identify problems in ESG reporting and disclosure	Hauman Yeung
Financial analysts and research students	Understand the effects of SDGs disclosure on corporate performance (HK vs. US)	Liane Lee
IR professionals and analysts	Integrating ESG sentiment into ESG performance	Louis Cheng

Date

21 Mar 2024
(Thur)

Venue

Rooms 1101-02, 11/F, Excellent Global Office, Euro Trade Centre, 13-14 Connaught Rd, Central

Time

Session 1: 1:45-4:00pm
Session 2: 4:00-6:15pm

SESSION 1

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

1. Opening Remarks (2:00-2:30pm):

Latest Development in Capturing ESG Sentiment for Listed Firms

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

2. Keynote Speech (2:30-3:15pm):

Using AI to Capture ESG Sentiment and Climate in Generating Alpha for Investment Portfolio

Speaker: Ms Vivi Hu, CEO, YoujiVest
Q&A: Prof Louis Cheng

3. Topical Dialogue (3:15-4:00pm):

Challenges of Evaluating ESG Disclosure of Hong Kong Listed Firms

Speaker: Mr Hauman Yeung, Director of Sustainability,
Ascent Partners
Moderator: Prof Louis Cheng

Funding Organisation:



Supporting Organisations:



Event Partner



Strategic Partners



Event Promotion Organisations



SESSION 2

Break/Session 2 Registration (4:00-4:15pm)

4. Keynote Speech (4:15-5:00pm):

Alternative Data and ESG Performance in Investments

Speaker: Mr Chris Tse, Chairman, The Institute of Financial Planners of Hong Kong and Honorary Fellow, Macquarie Applied Finance Centre

Q&A: Dr Liane Lee, Assistant Professor of Management, HSUHK

5. Featured Presentation (5:00-5:45pm):

The Effect of Employees' Opinions on Corporate ESG Performance

Speaker: Dr Liane Lee, Assistant Professor of Management, HSUHK

Q&A: Prof Louis Cheng

6. Concluding Remarks (5:45-6:15pm):

Applying ESG Intelligence to Enhance Corporate Communications

Speaker: Prof Louis Cheng

End of Event



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



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.

SPEAKERS



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 2024). 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



Ms Vivian Hu
CEO
YoujiVest

Vivian is an entrepreneur, she created her first startup in ECM and DCM while attending university. After graduation, she spent a number of years working for renowned fintech and data companies, and was an early innovator of ESG, who was instrumental in the product development and driving customer adoption in the market.

Later, she followed her passion to build another startup using cutting edge technology to influence the market for sustainability with long term revenue gain.

Vivian is a firm believer in technology and sustainability investment that can be combined to build an ecosystem to enhance investment returns and create positive value-add for society as well as the environment. She is multilingual in four fluent languages that includes English, Mandarin, Cantonese and Shanghaiese.

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

SPEAKERS



Mr Chris Tse

Chairman, The Institute of Financial Planners of Hong Kong
Honorary Fellow, Macquarie Applied Finance Centre

Mr Tse is a subject matter expert in designing and offering index/ESG solutions to the investment community throughout his tenure as an Asia regional leader with top 3 global index/ESG data providers, namely MSCI, FTSE Russell and Nasdaq Indexes.

Mr Tse is current Chairman of the Institute of Financial Planners of Hong Kong (IFPHK) that is an affiliate member of an international assembly of the Financial Planning Standards Board (FPSB). As stated in IFPHK's ESG statement, ESG policy is anchored in ESG promotion. Therefore, IFPHK is committed to promoting ESG education, disseminating its advantages, and increasing awareness among its members and pertinent business professionals. Mr Tse is currently appointed as program director for "Professional Certificate in Sustainable Investment Management and ESG Integration" that is approved as an eligible programme under the Pilot Green and Sustainable Finance Capacity Building Support Scheme by the Government of HKSAR.

Mr Tse acquired two Master degrees, one in Economic Analysis & Policy from the University of Warwick in the United Kingdom and the other in Investment Management from the Hong Kong University of Science and Technology. Mr Tse is a Chartered Financial Analyst (CFA) holder and has extensive professional qualifications in investment and financial risk management. In order to enhance his competence in offering Green and Sustainable investment solutions to institutional clients, he completed Certified ESG Analyst by EFFAS and Sustainability and Climate Risk Certificate awarded by GARP. He has been appointed as Honorary Fellow by Macquarie Applied Finance Centre since 2015.

SPEAKERS



Dr Liane Lee
Assistant Professor of Management
HSUHK

Dr Liane Lee has 15 years of senior management experience in product management and large-scale strategic project experiences and represented HSBC in developing landmark infrastructure financial projects such as Renminbi and Deposit Protection Scheme with the Hong Kong Monetary Authority. Her last post was Chief Operating Officer of a mining company based in the Asia Pacific region with a strong focus on sustainable mining practices, where she works with the geologist to device in sustainability plans to reinstate the original habitat and indigenous tribes that reside in the mine fields. Dr Lee received donation grants of HKD\$360k in big data analytics: workforce analytics. Her research focuses on Corporate Social Responsibility (CSR) related topics, media's impact on stock price, and sentiment big-data analytics.