Investment Roles are Evolving

More than 2/3 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 product development, including artificial intelligence and machine learning
- Increased focus on environmental
- Changing compliance requirements
- Fee pressure
- New investment vehicles, including alternative and unstructured data
- Client demand for new products, customization, and increased reporting
- Hybrid working model
- Increased focus on diversity, equity, and inclusion
- Changes in regulatory environment (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
- 64% 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
- Alternative data sources (social media, weather, credit card data, etc.)
- Proprietary, in-house metrics
- Your professional network
- Market sentiment indicators
- Independent research providers
- Large financial market data vendors (e.g., Bloomberg, FactSet)
- Companies’ financial statements
- Credit ratings

To view the full results, visit cfainstitute.org/skills