

SUSTAINABLE INVESTMENT INTEGRATION

Core SRI/ESG skills for investment professionals

OUTCOMES

After taking this course, you will be able to:

- ✓ Identify relevant sustainability and corporate governance factors and integrate these into your investment research and decision-making
- ✓ Communicate confidently with companies, colleagues, clients and other stakeholders about these factors and their relevance (or not) to your investment activities

WHO SHOULD PARTICIPATE

- ✓ 'Mainstream' financial analysts or portfolio managers - including those with an active mandate to 'integrate' and those with a general interest or corporate requirement to do so

COURSE ELEMENTS

Half day 1

The first half-day establishes the motivations for integration and focuses on identifying sustainability and corporate governance issues and applying these to stocks and sectors including:

- ✓ Context & foundations
- ✓ What is 'ESG integration'?
- ✓ Integration into valuation (basics)
- ✓ Integration into valuation (case study)
- ✓ A practitioner's view

Half day 2

The second half-day focuses on integrating sustainability issues into all stages of the investment decision-making process including:

- ✓ Academic evidence
- ✓ Issue identification exercise
- ✓ Leveraging internal & external resources
- ✓ Tools & tips for applying ESG integration objectives to day-to-day work

BOOKING DETAILS

Duration	2 x half days
Upcoming dates	22 Apr & 6 May 17 Jun & 1 Jul
Costs	€1,890 / £1,675
Trainers	Willem Schramade & Mike Tyrrell
Other details	Discounts available for groups