

Financial analysis, modelling & valuation

A practical foundation for
SRI / ESG professionals

Course schedule for H1'23

COURSE SUMMARY

Aim	Valuation fundamentals to enable ESG/SRI analysts to integrate with 'mainstream' investment decision-making
Duration	20 hrs over 7 sessions
Upcoming dates	7 March - 28 March 2 May - 23 May
Costs	EUR 3,500 + VAT USD 3,900 GBP 2,900
Training providers	SITA & Denny Ellison
Other	Discounts available for groups
Book	Via www.sita-training.com or contact@sita-training.com

The ability to integrate sustainability & mainstream investment factors will be the critical differentiator in sustainable investment over the next two years.

This course enables your SRI/ESG team to participate and win in this critical area.

Outcomes

The course is practical and designed to help ESG/SRI analysts understand fundamental financial analysis, the jargon used and the key thought processes involved in building an investment thesis.

It is built around real-life examples, applications, exercises and guidance. It will leave analysts able to communicate effectively with and influence 'mainstream' investment decision-makers and companies.

After taking this course, participants will:

- Have a solid technical foundation in financial analysis, valuation and investment communication
- Be equipped to engage with 'mainstream' investment analysts and introduce sustainability factors to investment decision-making discussions
- Be able to communicate confidently with clients and other stakeholders about the investment valuation context of your sustainability activities

Who should participate?

ESG / SRI analysts from asset managers or research providers

Why they should participate

The ability to integrate sustainability factors with 'mainstream' investment decision-making will be the critical differentiator in the next phase of the sustainable investment evolution. To make this possible:

- Sustainability analysts will need familiarity with the basics of financial analysis, modelling & valuation
 - (This course)
- 'Mainstream' investment analysts will need to understand sustainability
 - ([Sustainable investment integration course](#))

Course elements

The programme is divided between:

- Technical sessions and
- Application to sustainable investment sessions

Both types of session feature:

- Structured presentations
- Group discussions
- Solo-working exercises

Light-touch 'homework' will be set to facilitate learning. However, this is designed to integrate with the normal course of an analyst's job and will not require extra time.

Sessions & modules

All times are GMT (or British Summer Time as appropriate)

Day 1: Introduction: Context & the integration objective

09:00	START OF DAY	
09:00	Introduction to Day 1	Hybrid
09:30	The many outcomes of sustainable investment	Presentation
09:45	Connecting sustainability issues with business value drivers	Group exercise
10:45	Overview of the course programme	Presentation
10:55	Wrap up	Discussion
11:00	END OF DAY	

Day 2: Technical session #1: Financial analysis, modelling & valuation A

09:00	START OF DAY	
09:00	Intro to Day 2	Hybrid
09:05	Industry data analysis	Presentation
09:25	Company financial statements	Presentation
09:55	Company models & forecasts	Presentation
10:55	Break	
11:10	Operational & financial performance analysis	Presentation
12:40	Wrap up	Discussion
13:00	END OF DAY	

Day 3: Application session #1: Integrated sustainability analysis

09:00	START OF DAY	
09:00	Intro to Day 3	Hybrid
09:45	Presentation	Presentation
10:00	Asking the right questions	Group exercise
10:45	Wrap-up	Discussion
11:00	END OF DAY	

Day 4: Technical session #2: Financial analysis, modelling & valuation B

09:00	START OF DAY	
09:00	Introduction to Day 4	Hybrid
09:05	Valuation analysis	Presentation
10:55	Break	
11:10	Sector screens	Presentation
11:40	Portfolio performance	Presentation
12:10	Company results	Presentation
12:40	Wrap-up	Discussion
13:00	END OF DAY	

Day 5: Application session #2: Navigating research

09:00	START OF DAY	
09:00	Intro to Day 5	Hybrid
09:45	Using research provision effectively	Presentation
10:00	Exercise	Group exercise
10:45	Wrap-up	Discussion
11:00	END OF DAY	

Day 6: Technical session #3: Building an investment thesis

09:00	START OF DAY	
09:00	Introduction to Day 6	Hybrid
09:05	Interactive session	Group exercise
09:20	Key components of evaluating a company	Presentation
10:00	Example of an investment case	Presentation
10:20	Other factors to consider	Presentation
10:35	Break	
10:50	Putting all of the pieces together	Presentation
11:00	Presentation of the 'Investment Case Summary' (ICS) template	Presentation
11:05	Investment case example and exercise	Presentation
12:40	Wrap-up	Discussion
13:00	END OF DAY	

Day 7: Wrap-up: Focusing engagement & developing your career

09:00	START OF DAY	
09:00	Intro to Day 7	Hybrid
09:30	Focusing engagement	Hybrid
10:15	Developing your career internally & externally	Presentation
10:30	Wrap up	Discussion
10:45	END OF DAY	

Upcoming course dates

March

Day 1: Introduction: Context & the integration objective	7 March	09:30 - 11:40
Day 2: Technical session #1: Financial analysis, modelling & valuation A	8 March	09:30 - 13:30
Day 3: Application session #1: Integrated sustainability analysis	13 March	09:30 - 11:25
Day 4: Technical session #2: Financial analysis, modelling & valuation B	15 March	09:30 - 13:50
Day 5: Application session #2: Navigating research	20 March	09:30 - 11:25
Day 6: Technical session #3: Building an investment thesis	22 March	09:30 - 13:45
Day 7: Wrap-up: Focusing engagement & developing your career	28 March	09:30 - 11.10

May

Day 1: Introduction: Context & the integration objective	2 May	09:30 - 11:40
Day 2: Technical session #1: Financial analysis, modelling & valuation A	3 May	09:30 - 13:30
Day 3: Application session #1: Integrated sustainability analysis	8 May	09:30 - 11:25
Day 4: Technical session #2: Financial analysis, modelling & valuation B	10 May	09:30 - 13:50
Day 5: Application session #2: Navigating research	15 May	09:30 - 11:25
Day 6: Technical session #3: Building an investment thesis	17 May	09:30 - 13:45
Day 7: Wrap-up: Focusing engagement & developing your career	23 May	09.30 - 11.10

About SITA

The Sustainable Investment Training Associates is a partnership between highly-experienced and currently practicing sustainable investment professionals with a shared belief that training must be engaging, motivating, intellectually-stimulating and practically-relevant. Together we provide engaging, high-quality, results-orientated training from experienced sustainable investment practitioners.

Our purpose is to deliver the highest-quality sustainable investment training to all parts of the sustainable investment value chain by engaging the most experienced practitioners in the industry to deliver practical, engaging and commercially-relevant training through multiple formats to firms and people that want to develop.