

Sustainable investment integration

Core SRI/ESG skills for investment professionals

Course schedule for H1'23

COURSE SUMMARY

Aim	Practical tools to enable 'mainstream' investment analysts integrate sustainability factors into their sector allocation and stock selection decisions
Duration	7.5 hrs over two sessions
Upcoming dates	3 Apr & 10 Apr 5 June & 12 June
Costs	EUR 1,890 + VAT USD 2,100 GBP 1,575
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 'mainstream' investment analyst & PM team to participate and win in this critical area.

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

Differentiation

This course differentiates itself from others in the market through a robust focus on practical applicability by 'mainstream' investment analysts.

While we understand that such analysts need to understand the policy context and client requirements around 'ESG', we are primarily focused on the biggest question: "How can I use this information to improve my sector allocation and stock selection decisions?"

We are not aware of any other courses with this focus.

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

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:

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

Course elements

Teaching includes a combination of:

- Structured presentations
- Group discussions
- Solo-working exercises

Light-touch 'homework' will be set between the two sessions to enhance the applicability of the training. 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)

Programme for Day 1

13:00	START OF DAY	
13:00	Introductions & objectives	
13:30	Context & foundations	
14:00	What is ESG integration?	
14:30	Break	
14:45	Integration into valuation - basics	
15:15	Integration into valuation - case study	
16:15	External presentation	
16:30	Homework & wrap-up	
16:45	END OF DAY	

Programme for Day 2

13:00	START OF DAY	
13:00	Recap & homework review	
14:00	Academic evidence	
14:15	Issue identification exercise	
15:15	Break	
15:30	Leveraging internal & external resources	
16:30	Wrap-up	
16:45	END OF DAY	

Upcoming course dates

April

Session 1	3 April	13:00 - 16:45
Session 2	10 April	13:00 - 16:45

June

Session 1	5 June	13:00 - 16:45
Session 2	12 June	13:00 - 16:45

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.