



ESG & SUSTAINABLE FINANCE

LEARN WITH THE WORLD'S LEADING
FINANCIAL SERVICES TRAINING &
EDUCATION PROVIDER

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Welcome to ZISHI

ESG training for every level of financial services

Committed to unlocking success for your business, we have been empowering our clients to build resilience through knowledge for over 25 years.

A recognised global leader, we stand as the preferred and trusted training and education partner for a number of the world's most prestigious financial institutions.

Early that a real mind set change is taking place within the financial and corporate worlds, we have positioned ourselves at the forefront for learning interventions around Environmental, Social, and Governance (ESG), and Sustainability themes.

Our bespoke offering is the most comprehensive in the financial services sector. Whatever level of training you need, our experts will deepen your understanding and grow your knowledge in engaging ways that keep you one step ahead.



Innovative, Immersive & Interactive

Our training is purposefully practical and application driven. Of course, we don't expect you to become ESG experts overnight. We have, though, developed our unique training programmes to ensure you properly get under the skin of and thoroughly understand the subject matter.

As an example, we designed a pre-training workshop titled 'The Critical ESG Mindset' to ensure participants on the main programme understand all the complexities and nuances around ESG investing.



The Importance of Getting ESG Right

We learnt a long time ago that ESG isn't just a passing phase.

It has a vital role to play in an organisation's responsibility to evidence their efforts across the criteria.

While we don't need to tell you what ESG is, our breadth of knowledge and wealth of expertise is best placed to ensure you don't just meet what is expected of you, but you achieve beyond it.



Who We Train

Experts in ESG Investing,
Sustainable Finance &
Corporate Sustainability

Perfectly positioned at the intersection of ESG Investing, Sustainable Finance and Corporate Sustainability, ZISHI's experts can offer a comprehensive and compelling training offering for the buy-side, the sell-side, and the corporate sector.



<p>Product Offering/ Target Market</p>	<p>ESG Investing for the Buy-Side</p>	<p>Sustainable Finance for the Sell-Side</p>	<p>Corporate Sustainability for the Corporate Sector</p>
<p>Flagship Programmes</p>	<p>ESG BOOTCAMP</p>	<p>THE SUSTAINABILITY BANKER</p>	<p>THE SUSTAINABLE CORPORATION</p>
<p>Courses</p>	<ul style="list-style-type: none"> • ESG Analysis • ESG Investing • ESG Risk 	<ul style="list-style-type: none"> • Green Capital Markets • Green Financing • Green Listings & Capital Raisings • Materiality Analysis & Sustainability Analysis 	<ul style="list-style-type: none"> • ESG & Sustainability Training for Boards & Staff • New Business Models incorporating Sustainability



ESG Investing

For Asset Managers, Wealth Managers, SWFs & Pension Funds

Our experts work with leading asset managers, wealth managers, SWFs and Pension Funds assisting with their ESG Investing training programmes from the start. Consulting in this way allows us to analyse exactly what the outcomes should be from your ESG training, and which courses and programmes would meet your needs best.

As more and more asset managers and wealth managers embrace ESG investing, it will become critical for each player to differentiate its offering to stand out from the crowd. A competitive advantage can be gained from a superior ESG investment process or a unique ESG marketing message and narrative. This is where ZISHI Cornerstone can help.



ZISHI trainers are qualified to train in all aspects of ESG integration, from the latest techniques in ESG research and analysis to ESG portfolio construction and ESG risk management.

ESG Investing courses

- ESG Analysis
- ESG Investing
- ESG Risk

Setting the highest standard

We don't believe in one size fits all. All our programmes are built bespoke for your business. Whether it's for ESG research and analysis, ESG integration, ESG portfolio construction and ESG risk, we will design the training to perfectly match your needs.

Our expertise already expands to designing ESG marketing and selling programmes for leading private banks and wealth managers.

And as well as helping fund and wealth managers to articulate their ESG proposition via integrated technical and soft skills ESG programmes, we keep asset and wealth managers ahead of the curve on the latest ESG standards and regulations.

Corporate Sustainability

Corporations, C-Suite & Boards of Directors

All our experts have finance industry and academia backgrounds and vast experience of training corporate executives across the full spectrum of sustainability issues, from climate change and biodiversity to governance and social issues.

They are perfectly placed to share insights with corporate executives on what asset managers and investment banks expect on the investing and issuing fronts. They can't wait to do the same for you.

Sustainable Corporation courses

- ESG & Sustainability Training for Boards & Staff
- New Business Models incorporating Sustainability



Helping Executives stay ahead

Our expertise means we train corporate executives on the full range of sustainable finance products and how to use them to maximum effect for their organisations.

We don't believe in running the same programme time and time again. Our trainers explore what you need and train your Exec to the highest level. From emerging and disruptive business models and how to incorporate sustainability into business models, to integrating sustainability into risk management initiatives, we've got you covered.

As sustainability has moved up them boardroom agenda in recent years, corporations are having to pay more attention to training their employees on environmental and social issues.

The challenge to embed sustainability into the corporation's culture is both a risk to existing practices and an opportunity which many corporations are today realizing.

How We Train

Foundational level ESG and Sustainability programmes

For these programmes, efficient and time-effective knowledge transfer is important and the choice of delivery options is straightforward.

Sustainable Corporation courses

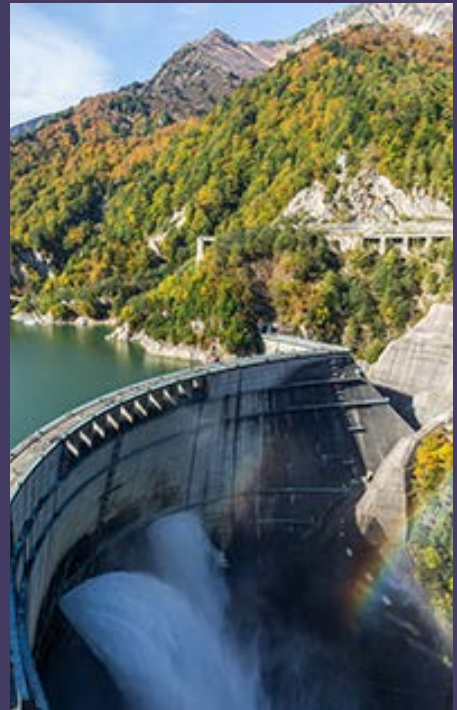
Designed for participants directly engaged with ESG and sustainability matters, the emphasis is on building key skillsets and competencies. For example, a critical ESG mindset is important for consulting and advisory roles whereas an ESG opportunity identification mindset is critical for relationship managers.

The choice of delivery options would be broader in these cases and would include scenario building and role plays, for example.



Expert level ESG and Sustainability programmes

For those requiring deep dives and strategizing issues, the ESG academy calls on its broader resource base from universities and consultancies. We can deliver a highly customised programme that is focused on ESG and sustainability issues specific to one sector or asset class, like oil & gas and infrastructure, for example.



Powerful Learning Solutions

Blended learning for better results.

We believe in a whole-of-organisation approach to ESG & Sustainability training, and our blended learning approach utilises all the right tools in all the right ways.

Our multi-channel delivery options can be mixed and matched and guarantee a seamless experience through whichever methods you prefer.

Our multi-channel delivery options can be mixed and matched and guarantee a seamless experience through whichever methods you prefer.

Bespoke Content Creation

Looking for tailor-made learning solutions? We specialise in crafting personalised content that aligns seamlessly with your organisation's objectives.



Real-World Simulator-Based Learning

Take the learning experience to the next level with immersive, hands-on experiences that bridge the gap between theory and practice.

Rapid Deployment

Need to quickly roll out bite-sized, focused learning modules? We've got you covered with swift and effective solutions.

Curated Learning Journeys

For clients seeking comprehensive ongoing learning pathways, our digital learning team possesses the expertise and knowledge to support your long-term ambitions.

Digitising Existing Content

We excel at transforming your traditional learning materials into dynamic, interactive digital formats, breathing new life into your educational resources.

Course Outlines

- 13 Fundamentals of Biodiversity & Natural Capital
- 15 Fundamentals of Climate Change
- 17 Fundamentals of Engagement & Stewardship
- 19 Fundamentals of ESG Analysis
- 21 Fundamentals of ESG Credit Risk Assessment
- 23 Fundamentals of ESG Disclosures & Reporting
- 25 Fundamentals of ESG Investing
- 27 Fundamentals of ESG Risk Assessment
- 29 Fundamentals of ESG Standards & Regulation
- 31 Fundamentals of Governance
- 33 Fundamentals of Green Finance
- 35 Fundamentals of Selling ESG Solutions to Private Banking Clients
- 37 Fundamentals of Selling Sustainable Finance Solutions to Corporates
- 39 Fundamentals of Social Issues
- 41 Fundamentals of Sustainable Business Models
- 43 Fundamentals of Sustainable Finance



FUNDAMENTALS OF BIODIVERSITY & NATURAL CAPITAL

This comprehensive course helps delegates understand biodiversity and natural capital, and both the opportunities and risks they present. Imparting why healthy ecosystems should be the norm in the business world and why any boardroom would be foolish not to react.



KEY BENEFITS

- Understand the dictionary and terminology of biodiversity and natural capital Frame and contextualise the narrative around biodiversity risks and opportunities
- Understand and appreciate the economics of biodiversity and why mainstream economics needs to put greater emphasis and importance on natural capital
- Consider and assess the interdependencies between the natural world and the business world
- Understand why healthy ecosystems are critical for the business world and why boardrooms ignore this risk at their peril

COURSE OVERVIEW

Biodiversity is moving up the agenda of investors and boardrooms and is being recognised as a risk that is comparable to climate change. The focus of this course is a comprehensive and holistic coverage of biodiversity and natural capital and the associated risks and opportunities that these present.

Delegates will be given a detailed summary and insight of the current biodiversity and natural capital dictionary and narrative and why this is important in our understanding of biodiversity risks.

Both the science and economics of biodiversity will be covered in depth to help delegates understand the linkages and interdependencies between biodiversity and the business world. The course concludes with an assessment of how biodiversity loss and degradation can impact various sectors and industries.

COURSE AGENDA

The dictionary of biodiversity and natural capital

- Biodiversity: meaning and relevance
- Natural capital: meaning and its relations to other forms of capital
- Ecosystem services: meaning and its links with business
- The relationship between biodiversity, natural capital and ecosystem services

The economics of biodiversity

- Bringing ecology and economics together
- The goods and services that nature supplies
- Changing our measures of economic progress
- Measuring biodiversity



The interdependencies between biodiversity, natural capital and the business world

- The implications of biodiversity loss and decline for business and society
- Ecosystem services are the basis of all economic activity
- Nature's existence value and intrinsic worth
- Assessing nature related financial risks

Integrating biodiversity into a natural capital assessment

- Ecosystems cannot adapt as fast as the climate is changing
- Tipping points, domino effects and collapsing ecosystems
- Degradation of nature from land use change to species exploitation
- Our global ecological footprint

In-House Training Option

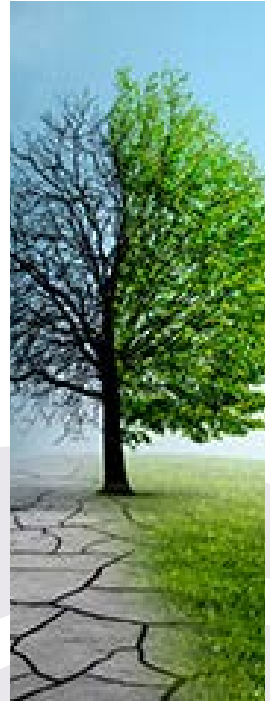
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FUNDAMENTALS OF CLIMATE CHANGE

This insightful course brings delegates up to speed on the current climate change dictionary and narrative. Separating the fact from the fiction in the climate change world and delivering a robust understanding of why and how societies need to be client resistant.

KEY BENEFITS

- Understand the dictionary and terminology of climate change
- Frame and contextualise the narrative around climate change risks and opportunities
- Understand and appreciate the science of climate change and embrace both the physics and chemistry behind the science
- Consider and challenge how mainstream economics is being upended by climate change and appreciate why alternative economic models are needed
- Compare and contrast various climate change mitigation and adaptation strategies with a view to understanding how societies can become more climate resilient



COURSE OVERVIEW

The focus of this course is a comprehensive and holistic coverage of climate change and the associated risks and opportunities that this phenomenon presents.

Delegates will be given a detailed summary and insight of the current climate change dictionary and narrative and why this is important in our understanding of climate change.

Both the science and economics of climate change will be covered in depth to help delegates differentiate between fact and fiction in the climate change world.

The course will conclude with an overview of how different societies are implementing climate change mitigation and adaptation strategies in order to become more climate resilient.

COURSE AGENDA

The dictionary of climate change

- Carbon emissions–scope 1, scope 2, scope 3
- Financed emissions–the importance of the financial sector
- Carbon budgets–what they are and why they are important
- Carbon sinks–what functions they fulfil

The physics and chemistry of climate change

- The Keeling Curve
- The connection between CO₂ concentration and the growth of human industrial production
- The greenhouse gas effect
- A closer look at carbon, nitrogen, hydrogen and methane



The economics of climate change

- The circular economy Vs the linear economy
- The Stern Report and its findings
- Pessimists Vs optimists – Stern Vs Nordhaus
- Nordhaus’s DICE Model of climate economics
- Dynamic Integrated Climate-Economy

Climate change mitigation, adaptation and resilience

- The microeconomic approach to studying climate change mitigation and adaptation
- Climate mitigation strategies
- Climate adaptation strategies
- Climate resilience strategies

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FUNDAMENTALS OF ENGAGEMENT & STEWARDSHIP

With ESG Engagement now a key priority for businesses, this course helps delegates fully understand its meaning and function. Exploring both the advantages and disadvantages that engagement can bring to your business and ensuring your business achieves it in the most effective way.



KEY BENEFITS

- Understand the meaning of engagement and stewardship
- Set out and formulate an ESG engagement agenda
- Compare and contrast the different engagement styles
- Assess the stewardship codes in operation
- Appreciate the benefits of collaborative engagement
- Understand and apply the practices of effective engagement

COURSE OVERVIEW

ESG engagement has moved up the investment agenda in recent years.

Understanding how ESG engagement works in practice and comparing the different engagement approaches and styles is very important.

Also, understanding the principles of stewardship codes is fundamental to effective ESG dialogue and engagement.

COURSE AGENDA

Activism and engagement in the context of ESG investing

- ESG Activism is growing in importance
- The principles of stewardship codes
- The role of proxy advisors
- How does engagement work and add value

How engagement creates value for companies and investors

- Features and practicalities of effective engagement
- Preservation and enhancement of value
- The importance of materiality
- The role of asset owners in stewardship activities



The features and purpose of an engagement plan

- Key issue engagement, stakeholder engagement, long-term value engagement
- Working with companies on specific ESG issues
- Issues-based Vs company-focused
- Engagement escalation measures – raising the stakes in an engagement

Assessing the performance of engagement activity, including benchmarking

- Shareholder resolutions, collective engagement and divestment
- Collective engagement frameworks
- Examining proxy resolutions
- Encouraging companies to change their behaviours

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FUNDAMENTALS OF ESG ANALYSIS

The aim of this course is to bring understanding and clarity of this complex and dynamic subject. Helping delegates analyse and assess how ESG factors could impact a company's cost of capital, operating performance and share price performance.



KEY BENEFITS

- Understand how ESG factors may affect a company's performance
- Assess how ESG factors impact a company's cost of capital, operating performance and share price performance
- Compare qualitative and quantitative approaches to ESG analysis and valuation
- Incorporate ESG analysis into the organisation's investment process
- Compare and assess the competing ESG scoring methodologies
- Analyse and apply ESG scores in valuation models

COURSE OVERVIEW

ESG analysis and valuation is an emerging discipline that is both complex and nuanced.

How ESG factors are likely to impact a company's valuation both in the short-run and long-run requires detailed consideration and analysis that goes beyond adjusting discount rates and growth rates.

Incorporating this analysis into an investment process and financial model poses further challenges. Many of these ESG issues are both emerging and dynamic, which complicates the analysis further.

COURSE AGENDA

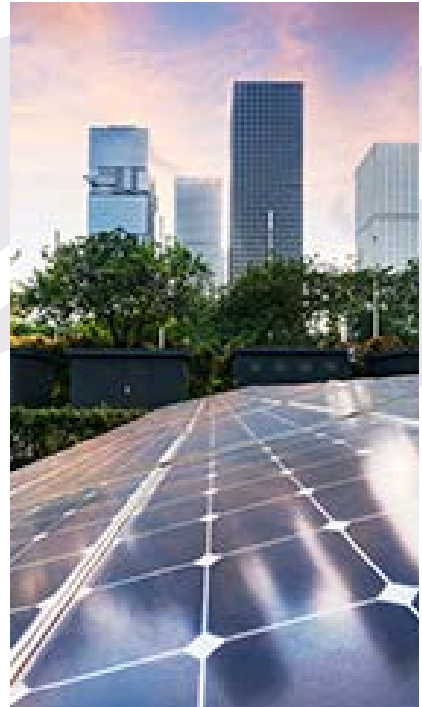
ESG Research and Analysis

- Incorporating ESG into traditional financial analysis
 - Making adjustments to financial model assumptions
 - ESG factors and the impact on company financial performance
 - ESG factors and the impact on security valuation
- Analysing the impacts on equities, fixed income and alternative asset classes



ESG Investment and Financial Analysis

- Compare traditional investment analysis to ESG investment analysis
- Describe the aims of integrating ESG into a firm's investment processes
- Describe the approaches to integrating ESG into a firm's investment processes
- Identify the relationship between ESG analysis and investment decision making
- Understand how to integrate ESG risks and opportunities into the traditional financial analysis of equity value
- Explain how Credit Rating Agencies approach ESG Credit Scoring
- Understand the importance of ESG rating agencies to companies and clients



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FUNDAMENTALS OF ESG CREDIT RISK ASSESSMENT

This course focuses on the impact that ESG issues are having on the credit outlook for all sectors. Demonstrating how to integrate ESG into traditional credit analysis for both corporate credits and sovereign debt issuers.



KEY BENEFITS

- Integrate ESG factors into credit analysis
Differentiate between key rating drivers and non-key rating drivers
- Compare the different rating agency approaches to analyzing ESG risks
- Appreciate the importance of ESG materiality maps
- Assess different ESG risk scoring approaches
- Understand the links between ESG factors and credit spreads

COURSE OVERVIEW

With the growing realisation that material ESG risks can be key credit rating drivers and can impact the creditworthiness of an issuer, the credit rating agencies are now committing serious resources to this endeavor. In fact, many ESG issues today lie at the intersection between credit risk and ESG risk and corporations need to be seen to be managing these risks proactively.

This course focuses on how and why more and more ESG issues are impacting on the credit outlook for all sectors. It considers the different approaches taken by the major credit rating agencies and demonstrates how ESG can be integrated into traditional credit analysis. Although the focus is mainly on the analysis of corporate credits, consideration will also be given to sovereign debt issuers.

COURSE AGENDA

ESG Integration into Credit Analysis

- Recognising and anticipating material ESG credit events
- Understanding corporate management’s approach to ESG risks
- ESG factors and credit spread analysis

ESG Material Mapping

- Features and practicalities of effective engagement
- Preservation and enhancement of value
- The importance of materiality
- The role of asset owners in stewardship activities



ESG Credit Scoring Methodologies

- Pricing ESG risk in credit assessments ESG scoring approaches

Credit Rating Agency Approaches

- Comparing the different CRA approaches to ESG credit risk assessment

In-House Training Option

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FUNDAMENTALS OF ESG DISCLOSURES & REPORTING

This comprehensive course delves into the emerging ESG disclosure and reporting regimes and examines what fund managers need to do to avoid accusations of 'Greenwashing'.



KEY BENEFITS

- Understand why the EU and UK are ahead of the pack
- Appreciate why this is becoming a 'race to the top'
- Contextualise the EU's 6 environmental objectives
- Apply the technical screening data and taxonomy-alignment
- Frame the circular economy and the environmental performance thresholds
- Compare and contrast different taxonomies across jurisdictions
- Understand the full nuances of greenwashing and transition washing

COURSE OVERVIEW

It is widely recognised that the EU taxonomy is one of the most significant regulatory developments in sustainable finance and will have wide ranging implications for investors and issuers working in the EU and beyond.

To advance the objectives of climate change mitigation and adaptation, the technical screening criteria of the taxonomy will determine when an economic activity can be considered sustainable. Other jurisdictions are likely to follow the lead of the EU Taxonomy in the future in developing their own sustainable economies. These developments are being driven to help investors make better informed decisions and to discourage greenwashing by all financial market participants.

This course focuses on these emerging ESG disclosure and reporting regimes and examines what fund managers need to do to avoid accusations of 'Greenwashing'.

COURSE AGENDA

The technical screening data and taxonomy-alignment

- Taxonomies as classification systems
- Understanding the importance of double materiality and dynamic materiality
- Applying the technical screening data

The circular economy and the environmental performance thresholds

- What is the circular economy and why is it important for sustainability?
- Links between the circular economy and environmental performance thresholds
- 'SLIC' and 'CLIC' models of circularity



SFDR and NFRD

- Sustainable disclosure regulations as mechanisms to capture and mitigate sustainability risks
- Why financial market participants are so important in reducing sustainability risks
- Classifying financial products according to their ESG and sustainable characteristics

Principal adverse impacts

- What is a principal adverse impact statement and why is it important?
- Incorporating sustainability risks and principal adverse impacts into an investment process
- Formulating due diligence policies around principal adverse impacts

In-House Training Option

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FUNDAMENTALS OF ESG INVESTING

Are your clients struggling with which ESG approach to adopt? This course helps you explore the differences and understand the skill, breadth and risk embedded in each, so you can reach a decision that meets your client's/asset owner's goals and objectives.



KEY BENEFITS

- Understand the main ESG integration and portfolio management processes
- Deciding on which ESG approach to adopt
- Differentiating between alpha generation and risk mitigation rationales
- Appreciating the nuances of the main ESG benchmarks and indices
- Applying ESG screens across the various asset classes
- Understanding the skill, breadth and risk embedded in each approach

COURSE OVERVIEW

IESG Integration and the various ESG portfolio management approaches have become a hot topic in recent years.

From exclusionary screening to impact investing and full ESG integration, the challenges and opportunities of each approach needs to be considered and set against the client's/asset owner's goals and objectives.

Each approach is assessed from a risk and return perspective and the underlying skill and breadth of each strategy is analysed.

The strategies are also analysed in the context of some popular ESG benchmarks and indices.

COURSE AGENDA

Session 1 – Exclusion-Based ESG Investing

- Overview of exclusion-based ESG investing
- Examples of large scale exclusion-based ESG investing
- Complexities in determining an exclusionary policy
- The problems and pitfalls of negative screening
- What impact do exclusions have on returns

Session 2 – Integration-Based ESG Investing

- What added-value do integration-based approaches offer
- Incorporating alpha insights into an integration-based approach
- Common ESG factors that are targeted
- Fundamental ESG integration – evaluating ESG factors



Session 3 – Impact-Based ESG Investing

- Defining impact-based ESG investing
- Understanding the cause and effect relationship in impact investing
- Impact investing as engaged ownership
- Making the impact objective explicit, intentional and measured
- Mission-related investments Vs programme-related investments

Session 4 – Engagement-Based ESG Investing

- Why do investors choose engagement-based ESG investing
- The different tones to engagement – collaboration, hostile
- The strategy for engagement – private, public
- Engagement through proxy voting

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FUNDAMENTALS OF ESG RISK ASSESSMENT

This course helps you navigate the various ESG risk frameworks, methodologies, and standards. It explores the principal environmental, social and governance risks, helping you take a more holistic view of broader risk management issues.

KEY BENEFITS

- Perform an ESG and sustainability risk audit
- Differentiate between the various categories of ESG risk
- Appreciate the importance of brand reputation risk attached to ESG issues
- Understand and minimise the risk of ESG litigation
- Formalise and implement an ESG governance framework
- Navigate the various ESG risk frameworks, methodologies, and standards



COURSE OVERVIEW

ESG risks are interconnected, multi-dimensional and non-linear, making them very difficult to both assess and quantify. Institutional investors and corporate boardrooms have long recognised the risk of reputational damage that can arise from ESG factors, but are now taking a more holistic view of the broader risk management issues around ESG and Sustainability.

This course addresses the full spectrum of ESG risks and assesses a number of practical top-down risk methodologies and frameworks. It addresses the principal environmental, social and governance risks individually whilst providing a holistic assessment of generic ESG risks at the organisational level.

COURSE AGENDA

The Principal ESG Risks

- The major material risks that emanate from
- environmental, social and governance issues
- Greenwashing/reputation risk
- Fiduciary, policy, and headline risk

Categorising ESG Risks

- Asset class, counterparty, sector, product, brand, territory
- ESG legal and litigation risk



Governance of ESG Risks

- How can ESG risks be overseen and governed – fund level, corporate level
- Accountability issues regarding ESG risks
- ESG risk committees

ESG Risk Frameworks, methodologies, and Standards

- The role of standards and frameworks
- Mandatory risk disclosure is coming on a number of ESG fronts

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FUNDAMENTALS OF ESG STANDARDS & REGULATIONS

This course provides an in-depth overview and insight into ESG frameworks and standards. As certain standards become part of mandatory disclosure requirements, this knowledge is essential for both financial institutions and corporations.



KEY BENEFITS

- Contextualise the various and competing ESG standards and frameworks
- Frame these standards within the broader ESG and Sustainability narrative
- Understand why more of these frameworks are being adopted and operationalized by the corporate and financial communities
- Appreciate how and why these standards are linked and connected to financial materiality and corporate performance
- Navigate the reporting and disclosure requirements behind these standards and frameworks

COURSE OVERVIEW

This course is a deep-dive into the plethora of standards, frameworks and regulations that surround ESG and sustainability. All interested parties need to understand why these frameworks and standards exist and what they are designed to achieve.

Increasingly, both the investing community and corporate world are embracing these standards and adopting them as guiding frameworks in their ESG implementation. Some of these standards are being adopted by regulators and are becoming part of mandatory disclosure requirements for both financial institutions and corporations.

COURSE AGENDA

An in-depth overview and insight into the following frameworks and standards:

- The Paris Agreement 2015 (UNFCCC)
- The Glasgow Agreement 2021
- The Sustainable Development Goals (SDGs)
- The Coalition for Environmentally Responsible Economies (CERES)
- The Sustainability Accounting Standards Board (SASB)
- The Value Reporting Foundation (VRF)
- The International Sustainability Standards Board (ISSB)
- The UN Principles for Responsible Investment (PRI)



- The Taskforce for Climate Related Financial Disclosure (TCFD)
- The Green Bond, Social Bond and Sustainable Bond Principles
- The Network for Greening the Financial System (NGFS)
- The Glasgow Financial Alliance for Net Zero (GFANZ)
- Principles for Responsible Banking (PRB)
- The Global Alliance for Banking on Values (GABV)
- The Global Reporting Initiative (GRI)

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FUNDAMENTALS OF GOVERNANCE

This insightful course gives a comprehensive overview of the evolution of corporate governance frameworks and standards. Specifically covering best practice for effective corporate governance and how to incorporate governance issues into financial models.

KEY BENEFITS

- Understand the key issues of alignment and accountability
- Describe the relationship between corporate governance, companies, and investors
- Understand how governance issues impact on investment decisions
- Appreciate the risks of ignoring governance issues in investment decisions
- Explore the concepts of board structure, diversity, effectiveness, and independence
- Compare and contrast the extent of variation of best practice across markets

Describe the potential issues and key impacts of inadequate corporate governance



COURSE OVERVIEW

The course will cover best practice in the area of corporate governance and how we may incorporate governance issues into financial models.

A comprehensive overview of the evolution of corporate governance frameworks and standards will be covered along with an assessment of the main models of corporate governance around the world.

The question as to what makes for effective corporate governance will be examined.

COURSE AGENDA

Concepts of Governance

- Accountability and alignment
- Management structure and diversity
- Employee relations
- Executive and employee compensation
- Financial integrity and transparency
- Different board structures
- Role of the Chair



The Regulation and Governance surrounding ESG investing

- Sustainable disclosure regulations as mechanisms to capture and mitigate sustainability risks
- Why financial market participants are so important in reducing sustainability risks
- Classifying financial products according to their ESG and sustainable characteristics

Best practice in corporate governance

- A comparison of governance practices around the world

In-House Training Option

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FUNDAMENTALS OF GREEN FINANCE

This course introduces the main areas of green finance and how it fits within the broader ESG and sustainability frameworks. It also covers the important areas of carbon finance, carbon pricing and carbon trading systems.



KEY BENEFITS

- Appreciate and understand how green finance fits within the overall ESG ecosystem
- Establish the links between green finance and sustainability
- Understand why governments are encouraging the growth of green financial markets
- Navigate the ecosystem of green financial markets and products
- Understand the following concepts : Climate change, Circular economy,
- Planetary boundaries, Stranded assets, Biodiversity, Ecosystem services
- Understand and appreciate the working of green bonds and green loans
- Understand the complex world of carbon finance and carbon pricing

COURSE OVERVIEW

A comprehensive overview of the main areas of green finance and how green finance fits within the broader ESG and sustainability frameworks. Delegates will be introduced to the main green finance products available on the market and how corporations can put these financing instruments to maximum benefit.

The course also comprehensively covers the important areas of carbon finance, carbon pricing and carbon trading systems. As pressure grows on nations to introduce carbon taxes, the course examines the optimal avenues open to countries in their challenge to reach net-zero.

COURSE AGENDA

Green and Climate Bonds

- What are green bonds and green loans and how do they work?
 - The green bond and green loan principles
- What comes under the classification of a green bond
- Overview of the global green bond market
- Performance characteristics of green bonds
- How are the bond proceeds used – external verifiers
- Recent themes in green bond investing



Carbon Finance, Carbon Pricing and Carbon Trading Systems

- Carbon pricing as the weapon of choice in the climate fight
- The challenges to putting a price on carbon
- Carbon taxes Vs emissions trading systems
- The role of internal carbon prices
- How emissions trading systems work
- The role of carbon permits and achieving the right supply/demand balance
- The EU carbon market
- The Chinese emissions trading market
- Carbon border tax policies as a weapon

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FUNDAMENTALS OF SELLING ESG SOLUTIONS TO PRIVATE BANKING CLIENTS

This one day programme for Relationship Managers combines practical client diagnostic skills training with ESG portfolio management diagnostic skills training. Developing the skills needed to understand the client motivations behind ESG investing.

KEY BENEFITS

- Understand the forces driving the growth of this area of investing
- Appreciate the client's goals, values and principles around ESG investing
- Match the ESG portfolio objectives to the different client profiles and diagnostics
- Digest the house ESG view and present it with conviction
- Prepare the groundwork for an effective ESG portfolio review
- Apply RM sales methodologies to ESG investing approaches and build a narrative around ESG investing



COURSE OVERVIEW

Many forces are at work today transforming the way businesses and industries operate, markets function and societies develop. What was seen as a niche investment area for Wealth Managers not so long ago, ESG investing is now entering the mainstream and Private Banking RMs need to have the skillsets to be able to identify and meet their clients' needs in this area of investing.

This one day programme combines practical client diagnostic skills training with ESG portfolio management diagnostic skills training. The day focuses on the key skills that the Relationship Manager needs to have to understand the client motivations behind ESG investing. The specific nuances around ESG investing will be covered and client sensitivities around ESG issues will be addressed.

COURSE AGENDA

ESG Investing and Wealth Management

- The wealth management industry embraces ESG investing
- Factors that are influencing Wealth Managers embrace ESG investing
- Generational shifts in attitude towards investing and engagement
- Why this area will witness dramatic growth and transform investing

Client Diagnostics and Needs around ESG Investing

- The wealth management loop and ESG issues
- The client's goals, values and principles
- The client's motivators and 'hot buttons' around ESG issues
- Marrying the client diagnostics to the ESG diagnostics



Portfolio Diagnostics around ESG Issues

- Goal-based and outcome oriented investing
- Social returns, mission- based investing and investing for a purpose
- How these different motives change the private client's utility function
- ESG, active investing and alpha

Formulating and Positioning ESG Solutions to Private Banking Clients

- How the RM can establish a business purpose around ESG issues
- Specific nuances around ESG investing that RMs need to be sensitive to
- Building a narrative around ESG investing
Positioning ESG views to different client types

In-House Training Option

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FUNDAMENTALS OF SELLING SUSTAINABLE FINANCE SOLUTIONS TO CORPORATES

As the corporate world comes under intense pressure to adopt ambitious sustainable performance targets and KPIs around ESG issues, this course helps bankers to deepen the dialogue with their clients around sustainability issues.



KEY BENEFITS

- Understand why the emergence of the ‘Sustainability Banker’ has the potential to herald major changes in corporate banking and corporate finance worlds
- Appreciate and navigate today’s sustainability and ESG narrative and why the convergence between corporate sustainability and ESG represents a huge opportunity for the banking industry.
- Deepen the sustainability dialogue with the corporate banking client
- Understand and exploit the connections between the corporate clients’ materiality analysis, their sustainability goals, and the ultimate sustainable finance solution
- Understand and explain the features, benefits, risks, and applications of the main sustainable finance products offered by the market

COURSE OVERVIEW

The sustainable finance market is enjoying rapid growth around a host of new products, both bonds and loans, that gives the corporate client great flexibility around how they use the proceeds.

More and more banks have ambitions to move beyond the role of bookrunner to act more as strategic advisors and structurers to their corporate clients in this growth market.

With the corporate world coming under intense pressure to adopt ambitious sustainable performance targets and KPIs around ESG issues, bankers need to deepen the dialogue with their clients around sustainability issues.

COURSE AGENDA

ESG, Sustainable Finance and the Corporate World

- The corporate world embraces ESG
- Factors that are driving corporate sustainability
- The emergence of the 'Sustainable Banker'
- Why sustainable finance will witness dramatic growth and transform financing

Client Diagnostics and Needs around Sustainable Finance and ESG

- The 'Sustainability' loop and ESG issues
- The client's goals, values, and principles
- The client's motivators and 'hot buttons' around ESG and sustainability issues
- The challenges and opportunities around sustainable finance for bankers



Formulating and Positioning Sustainable Finance Solutions to Corporate Banking Clients

- How the corporate banker can establish a business purpose around sustainability and ESG issues
- Specific nuances around sustainability and ESG investing that bankers need to be sensitive to
- Building and deepening the narrative around sustainability and ESG
- Positioning sustainability issues with different sectors and industries

In-House Training Option

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FUNDAMENTALS OF SOCIAL ISSUES

As social issues move up the agenda, the aim of this course is to help delegates understand the social issues and assess the key megatrends influencing social change in terms of potential impact on companies.

KEY BENEFITS

- Understanding the social megatrends influencing social change and likely impact on investment policies
- Anticipate emerging social issues that could impact on corporate valuations
- Assess the materiality impacts of social issues
- Understand the risks of ignoring social issues in investment decisions
- Integrate social issues into investment strategies



COURSE OVERVIEW

Social issues are moving up the agenda of boardrooms and corporate managements are being asked to assess their preparedness to handle these issues.

For investors, an assessment of the systemic relationships between business activities and social issues is required along with an understanding of how to apply material social factors to traditional financial and equity analysis.

The aim of this course is to understand the social issues that exist and how these social issues impact on businesses, hence on investment decisions, so that we can incorporate the assessments into our financial models.

The course will assess the key megatrends influencing social change in terms of potential impact on companies.

In addition, the course addresses the various benchmarks and standards focusing on corporate human rights and labour standards.

COURSE AGENDA

Identify the relevant ESG social issues

- Human rights and labour rights
- Diversity, inclusivity and discrimination
- Consumer protection

The relationship between social issues, companies and investors

- Social factors that impact internal stakeholders
- Social factors that impact external stakeholders
- Social issues in supply chains

How social issues impact on investment decisions

- Identifying the most material social factors
- Human rights violations in the supply chain



How to incorporate social issues into financial models

- The importance of benchmarks and standards – UDHR, UNGPs, CHRB, KnowTheChain
- Adjusting discount rates in valuation models

In-House Training Option

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FUNDAMENTALS OF SUSTAINABLE BUSINESS MODELS

As the need for corporations to adapt and pivot their business models to the new era of sustainability and ESG materiality grows, this course addresses emerging business models through the lens of stakeholder models and shared value theory.

KEY BENEFITS

- Appreciate the links between ESG, finance and emerging business models
- Understand the components of triple-bottom line accounting and sustainability accounting
- Frame the ESG debate in the context of stakeholder value theory
- Compare and contrast the various emerging business models
- Understand the essence of corporate purpose and shared value theory
- Appreciate why companies need to embrace ESG best practices to justify and enhance their legitimacy



COURSE OVERVIEW

It is now recognised that the link between ESG and Finance is business models. Increasingly businesses are being asked to define their purpose and legitimacy through a social and environmental lens within a broad ESG framework.

It is therefore essential for corporations to adapt and pivot their business models to this new era of sustainability and ESG materiality.

This course addresses these emerging business models through the lens of stakeholder models and shared value theory.

COURSE AGENDA

Theoretical Backdrop : The Shareholder Model Vs Stakeholder Model

- Agency theory and the separation of ownership and control
- Shareholder value theory and ESG integration are compatible
- Stakeholder value theory and why it is on the ascendancy
- Narrow versus broad definitions of stakeholders
- Defining corporate responsibilities to all stakeholders
- Frameworks for shareholder stewardship



ESG, Sustainability and the Corporate World

- What is meant by sustainability
- The difference between sustainability and corporate social responsibility
- The worlds of corporate sustainability and ESG investing are converging
- The 3 pillars of sustainability
Sustainability accounting frameworks

Emerging Business Models

- Business sustainability and managing the 'triple bottom line'
- The future-fit corporation and business model
- The 'SLIC' corporation – Social, Lean, Integrated and Circular
- Shareholder value – Shared value – System value
Short-term profitability Vs long-term sustainability

In-House Training Option

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FUNDAMENTALS OF SUSTAINABLE FINANCE

As the sustainable finance market continues to grow, this course focuses on the main sustainable finance instruments, exploring their features, benefits, and applications.

KEY BENEFITS

- Understand the key drivers behind the growth in sustainable finance
- Differentiate between use-of-proceeds instruments and general corporate purpose instruments
- Understand the main KPIs and SPTs used in practice
- Appreciate the rationale behind the concept of 'meaningful, measurable, and ambitious'
- Differentiate between the various sustainable finance instruments and their various features and benefits
- Understand the various principles and standards (ICMA) set up to ensure transparency and integrity in the sustainable finance market



COURSE OVERVIEW

The sustainable finance market is going from strength to strength with some commentators suggesting that all future bond issues will have a sustainable rationale or theme.

This course focuses on the main sustainable finance instruments and the ICMA principles and standards established to promote transparency and integrity in the market.

Whether use-of-proceeds or general corporate purpose-based instruments, the course will do a deep-dive into each instrument's features, benefits, and applications.

COURSE AGENDA

Green Bonds

- What are green bonds and how do they work?
The green bond principles and green bond initiatives
- What comes under the classification of a green bond
- Performance characteristics of green bonds
- How are the bond proceeds used – external verifiers

Social Bonds

- What are social bonds and how do they work ?
- The social bond principles initiative
- The financial structure of social bonds
- Social bond finance projects that address social issues



Sustainability Bonds and Loans and Sustainability-Linked Bonds and Loans

- Business sustainability and managing the ‘triple bottom line’
- The future-fit corporation and business model
- The ‘SLIC’ corporation – Social, Lean, Integrated and Circular
- Shareholder value – Shared value – System value
Short-term profitability Vs long-term sustainability

Transition Bonds

- What are they and how do they work ?
- Financing ‘Brown to Green’ via transition bonds
- Defining corporate KPIs and ESG indicators
- What makes a relevant KPI

In-House Training Option

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Contact Us

Let's talk ESG

Whatever your ESG training needs, we have the expertise, knowledge and ability to deliver first-class results at every level, every time.

Please get in touch to discuss how our bespoke solutions already help world-leading organisations meet their ESG needs and how we can do the same for yours.



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