PROFESSIONAL CERTIFICATE IN SUSTAINABLE INVESTMENT



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TRAINING CENTER

GENTEX Training Center LLC | Orlando - FL, USA
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Introduction

Professional Certificate in Sustainable Investment Training Course equips investment professionals to evaluate sustainability factors and act on them with discipline. Participants learn how environmental, social and governance issues translate into financial risk and opportunity, and how to build that analysis into portfolio decisions. The programme covers ESG frameworks, sustainable investment strategies, screening, integration, impact measurement, stewardship and reporting. Furthermore, it addresses climate risk, green bonds, sustainability disclosure standards and anti-greenwashing duties. As a result, delegates can design and defend a sustainable investment approach that fits a mandate. Gentex Training Center delivers the programme through modelling workshops and portfolio case work.

Professional Certificate in Sustainable Investment Course Objectives

- Explain how ESG factors affect financial risk and long-term return.
- Apply leading ESG frameworks and reporting standards to investment analysis.
- Compare screening, integration, thematic and impact investment strategies.
- Assess climate risk, transition risk and physical risk at portfolio level.
- Evaluate green, social and sustainability-linked bonds and labelled funds.
- Apply ESG scoring, ratings and data quality assessment.
- Integrate ESG factors into valuation and portfolio construction.
- Measure sustainability outcomes and impact with credible metrics.
- Apply stewardship, engagement and voting duties to held assets.
- Report sustainable investment approach, risk and outcomes to stakeholders.

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Course Methodology

The course combines technical briefings with hands-on portfolio workshops and case studies. Participants assess ESG data, integrate sustainability factors into a valuation model and prepare a stewardship and reporting plan. In addition, structured peer debate sharpens judgement, and each day closes with an applied sustainable investment task.

Who Should Take This Course

- Investment managers, analysts and portfolio specialists.
- Pension, endowment and sovereign fund investment staff.
- Sustainability, ESG and responsible investment officers.
- Corporate finance, treasury and investor relations professionals.
- Risk, compliance and reporting staff covering ESG disclosure.
- Consultants, auditors and advisers supporting sustainable investment.

Professional Certificate in Sustainable Investment Course Outlines

Day 1: Sustainability, ESG and Investment Materiality

- Sustainable investment definitions and the investment case.
- Materiality assessment and sector-specific ESG factors.
- ESG frameworks: SASB, GRI, TCFD and the UN Principles for Responsible Investment.
- Ratings, scores and data provider differences.
- Greenwashing risks and anti-greenwashing expectations.
- Regulatory direction on sustainability disclosure.

- Workshop: running a materiality assessment for a chosen sector.

Day 2: Sustainable Investment Strategies and Portfolio Integration

- Screening approaches: negative, positive and norms-based.
- ESG integration into fundamental analysis and valuation.
- Thematic and impact investing strategies.
- Exclusion policies, thresholds and mandate design.
- Index construction, ESG benchmarks and tracking considerations.
- Asset allocation effects of sustainability preferences.
- Workshop: integrating ESG factors into a valuation model.

Day 3: Climate Risk, Carbon and Transition Analysis

- Physical risk, transition risk and liability risk.
- Scope 1, 2 and 3 emissions and carbon accounting basics.
- Carbon footprinting and portfolio carbon intensity.
- Scenario analysis aligned with TCFD recommendations.
- Net zero targets, pathways and interim milestones.
- Stranded asset risk in carbon-intensive sectors.
- Workshop: measuring portfolio carbon intensity and running a scenario.

Day 4: Sustainable Finance Instruments and Impact Measurement

- Green, social, sustainability and sustainability-linked bonds.

- Use of proceeds, verification and reporting duties.
- Sustainability-linked loans and performance targets.
- Labelled funds, classifications and disclosure duties.
- Impact measurement frameworks and theory of change.
- Additionality, attribution and outcome reporting.
- Workshop: assessing a sustainable bond and an impact fund claim.

Day 5: Stewardship, Voting and Reporting

- Stewardship codes and engagement programme design.
- Voting policy, escalation and collaborative engagement.
- Engagement records and outcome tracking.
- Reporting sustainable investment approach to clients and regulators.
- Building a sustainability report and committee paper.
- Presenting and defending a sustainable strategy under challenge.
- Workshop: presenting a stewardship and sustainable investment review to a panel.

Conclusion

By successfully completing Professional Certificate in Sustainable Investment Training Course, participants will have acquired the knowledge to assess sustainability factors, integrate them into investment decisions and report outcomes credibly. They will understand ESG frameworks, sustainable strategies, climate and carbon analysis, sustainable finance instruments, stewardship and disclosure, and they will know how to avoid greenwashing claims. As a result, delegates build sustainable portfolios that withstand scrutiny. Gentex Training Center builds the programme around current sustainable investment practice.

LEARN BOLD. **LEAD BEYOND**
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FAQs for the Professional Certificate in Sustainable Investment course

Q1 What is the "Professional Certificate in Sustainable Investment" course about?

It covers how sustainability factors are assessed and built into investment decisions. You learn ESG frameworks and data, sustainable investment strategies, climate and carbon analysis, green and sustainability-linked instruments, impact measurement, stewardship and reporting, with practical portfolio case work.

Q2 What are the key benefits of the "Professional Certificate in Sustainable Investment" course?

You gain the ability to treat sustainability as financial analysis rather than a label. You also improve ESG data judgement, integrate material factors into valuation, measure climate and carbon exposure properly, run credible stewardship and engagement, and report a strategy that withstands greenwashing scrutiny.

Q3 What skills will I gain from the "Professional Certificate in Sustainable Investment" course?

You will gain ESG analysis and materiality assessment, sustainable investment strategy and portfolio integration, climate risk and carbon analysis, and stewardship, impact measurement and sustainability reporting.

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Q4 What tools, methods, or standards are covered in the "Professional Certificate in Sustainable Investment" course?

The course covers the SASB, GRI, TCFD and UN PRI frameworks, ESG ratings and data provider comparison, negative, positive and norms-based screening, ESG integration into valuation models, thematic and impact strategies, Scope 1, 2 and 3 emissions and carbon footprinting, portfolio carbon intensity, TCFD-aligned scenario analysis, net zero pathways, green, social and sustainability-linked bonds, labelled fund classifications, impact measurement frameworks, stewardship codes, voting and engagement policies, and sustainability disclosure and reporting standards.

Q5 How is the "Professional Certificate in Sustainable Investment" course applied in real-world practice?

Graduates apply it to conduct materiality assessments, integrate ESG factors into valuation and portfolio construction, measure and reduce portfolio carbon exposure, evaluate green and sustainability-linked instruments, design engagement and voting programmes, prepare sustainability reports and committee papers, and respond to client and regulatory disclosure requirements.