SUSTAINABLE INVESTMENT



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TRAINING CENTER

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GENTEX Training Center LLC | Orlando - FL, USA
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Introduction

Sustainable Investment Training Course prepares investment professionals to build portfolios that pursue financial returns alongside environmental and social outcomes. Participants learn how sustainability factors are identified, assessed and carried into portfolio decisions, and how to report performance against both objectives. The programme covers sustainable investment strategies, ESG integration, climate risk, screening, thematic and impact approaches, stewardship and reporting. Furthermore, it addresses regulatory expectations, taxonomy alignment and greenwashing risk. As a result, delegates can design and defend an investment approach that withstands client and regulatory scrutiny. Gentex Training Center delivers the programme through modelling workshops and applied portfolio case work.

Sustainable Investment Course Objectives

- Explain sustainable investment strategies and their financial rationale.
- Assess environmental, social and governance factors for materiality.
- Apply screening, integration, thematic and impact approaches.
- Integrate ESG factors into valuation and portfolio construction.
- Assess climate risk across a portfolio and by sector.
- Apply sustainability taxonomies and eligibility criteria to holdings.
- Measure portfolio sustainability performance and impact.
- Apply stewardship, engagement and voting duties to held assets.
- Apply disclosure standards and reporting requirements to portfolios.
- Assess greenwashing risk and strengthen product governance.

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Course Methodology

The course combines technical briefings with hands-on portfolio workshops and applied investment case studies. Participants assess a portfolio for sustainability exposure, integrate ESG factors into an analysis and prepare a reporting extract. In addition, structured peer review and investment committee simulation sharpen judgement, and each day closes with an applied investment task.

Who Should Take This Course

- Investment managers, analysts and portfolio specialists.
- Pension, endowment and sovereign fund investment staff.
- Asset owners and consultants setting investment policy.
- Sustainability and ESG officers in investment institutions.
- Risk, compliance and product governance professionals.
- Advisers and auditors on sustainable investment arrangements.

Sustainable Investment Course Outlines

Day 1: Sustainable Investment Strategies and Market Context

- Sustainable investment definitions and market development.
- Investment approaches: screening, integration, thematic and impact.
- The financial case and evidence on sustainability and returns.
- Asset owner objectives and mandate design.
- Regulatory direction and market expectations.

- Institutional strategies and policy statements.
- Workshop: mapping sustainable investment approaches to a mandate.

Day 2: ESG Analysis and Integration

- Materiality assessment by sector and business model.
- ESG data sources, ratings and provider differences.
- Integrating ESG factors into fundamental analysis.
- ESG factors in valuation and cost of capital estimation.
- ESG integration into credit analysis for fixed income.
- Data quality, estimation and disclosure limitations.
- Workshop: integrating ESG factors into an investment analysis.

Day 3: Climate Risk, Screening and Thematic Approaches

- Climate risk: transition, physical and liability exposure.
- Portfolio carbon footprinting and intensity measurement.
- Sector exposure analysis and carbon-intensive holdings review.
- Negative, positive and norms-based screening design.
- Thematic strategies across energy, water and social themes.
- Exclusions, thresholds and their portfolio effects.
- Workshop: assessing climate exposure and screening criteria.

Day 4: Impact, Portfolio Construction and Performance

- Impact investment definitions and additionality.
- Impact measurement frameworks and outcome indicators.

- Portfolio construction with sustainability objectives and constraints.
- Diversification, risk limits and tracking considerations.
- Performance measurement and attribution with sustainability lenses.
- Balancing financial return against impact objectives.
- Workshop: building a portfolio with sustainability objectives.

Day 5: Stewardship, Disclosure and Product Governance

- Stewardship codes and engagement programme design.
- Voting policy, escalation and collaborative engagement.
- Disclosure standards and portfolio reporting requirements.
- Taxonomy alignment reporting for portfolios and funds.
- Greenwashing risk, naming rules and product governance.
- Presenting a sustainable investment strategy to a committee.
- Workshop: presenting a sustainable investment strategy to a panel.

Conclusion

By successfully completing Sustainable Investment Training Course, participants will have acquired the knowledge to design, implement and report sustainable investment approaches. They will understand strategy selection, ESG integration, climate risk assessment, screening and thematic approaches, impact measurement, stewardship and disclosure, and they will know how to defend a portfolio against greenwashing challenge. As a result, delegates manage sustainability and financial objectives together with evidence. Gentex Training Center builds the programme around current investment practice.

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FAQs for the Sustainable Investment course

Q1 What is the "Sustainable Investment" course about?

It covers how investment portfolios pursue financial return alongside environmental and social outcomes. You learn sustainable investment strategies, ESG integration, climate risk assessment, screening and thematic approaches, impact measurement, stewardship and reporting.

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

You gain the ability to build sustainability into portfolio decisions on evidence rather than labels. You also improve materiality and data judgement, assess climate exposure properly, measure impact credibly, run stewardship programmes with purpose, and report performance in a form clients and regulators accept.

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

You will gain sustainable investment strategy selection and market analysis, ESG analysis and integration into valuation and portfolio decisions, climate risk and screening assessment, and impact measurement, stewardship and sustainable portfolio reporting.

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

The course covers screening, integration, thematic and impact investment approaches, materiality assessment by sector, ESG data sources and rating methodology comparison, ESG integration into fundamental analysis and valuation, cost of capital adjustment, credit analysis integration for fixed income, climate transition, physical and liability risk assessment, portfolio carbon footprinting and intensity measurement, sector exposure and carbon-intensive holdings review, negative, positive and norms-based screening design, exclusion and threshold setting, impact measurement frameworks and outcome indicators, additionality assessment, portfolio construction with sustainability constraints, diversification and tracking considerations, performance attribution with sustainability lenses, stewardship codes and engagement programme design, voting policy and escalation, disclosure standards and portfolio reporting requirements, taxonomy alignment reporting, and greenwashing indicators and product governance controls.

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

Graduates apply it to write and review sustainable investment policy, assess holdings for material ESG factors, integrate sustainability into valuation and credit analysis, measure portfolio carbon exposure and intensity, design screening and exclusion criteria, build thematic and impact mandates, run engagement and voting programmes, prepare sustainability disclosures and reports, and review funds for greenwashing risk.