

## Advanced Programme on Sustainable Finance: Sustainable Finance in Investment Management

### GOALS

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Global sustainability challenges – including climate change, natural resource depletion, and rising inequality – are affecting the commercial environment in a way that presents both risks and opportunities for the financial sector.

The "Advanced Programme on Sustainable Finance" courses are giving you the knowledge and tools needed to address and take advantage of these changes. The course topics including sustainability goals and ESG-related risks, are perfect for business and risk managers, compliance officers, investment professionals, management consultants, and financial analysts of all types, as delivering impact by sustainable finance and resilience to ESG risks are increasingly important for financial institutions. We therefore aim at helping finance professionals to manage the risks and opportunities arising from the transition to a more sustainable economy, as well as its financial and non-financial impact.

This program consists of a series of training courses specifically designed around certain themes.

These courses are:

- Advanced Programme on Sustainable Finance: Global sustainability challenges, goals and disclosure frameworks
- Advanced Programme on Sustainable Finance: Sustainability goals and Sustainable finance regulations in the EU
- Advanced Programme on Sustainable Finance: ESG Risk Management and Regulatory Compliance
- Advanced Programme on Sustainable Finance: Sustainable finance in Investment Management
- Advanced Programme on Sustainable Finance: Sustainable Finance in Equity and Debt Capital Markets Management
- Advanced Programme on Sustainable Finance: Sustainable Finance in Transaction Banking.

Objectives:

- You will gain an understanding of how the current financial system works, the social and environmental pressures it faces, and how it can be rewired to create better value for society and your organization. Develop the ability to channel your organization's financial success through sustainable approaches and initiatives such as the integration of Environmental, Social, and Governance (ESG) investing, impact investing, and positive screening.
- You will also unlock new perspectives on how businesses, banks, and insurers are shifting investment towards more sustainable business models to lower risk and capture long-term growth opportunities. Walk away with tangible, real-world models that can deliver positive long-term returns for your business, clients, and society.
- Gain the tools, frameworks, and strategies to implement sustainable finance in your organization, underpinned by social and environmental values, creating long-term financial benefits.

### SUMMARY

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Category:

- Risk, finance & treasury
- Private banking & asset management
- Compliance & audit
- Durability

Difficulty level:

Advanced

Certification type:

In class training

**Price:**

- Member: € 550.00
- Non member: € 650.00
- Partner BZB: € 550.00
- Incompany: custom tailored, prices on demand

**CPD hours:**

- Bank: **6h** general
- Insurances: **6h** general
- Compliance: **6h**

## INTENDED AUDIENCE

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These advanced training courses (with preliminary basic introduction if requested) can be followed by various target groups in financial institutions:

- Relationship, sales and portfolio managers in banks, insurance companies and investment firms
- Staff in risk, compliance, internal audit and legal departments
- Front and Middle office middle management, both commercial and supporting functions

## FOREKNOWLEDGE

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**Advanced level training:** this training requires a general basic knowledge of the subject.

**Preparation:** Persons wishing to take the course are strongly advised to have completed the E-Learning "Introduction to Sustainable Finance"

## CONTENT

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### CONTENT

- Before 2006 : the origins of what would become the building blocks of sustainable investing
- Exclusions
  - Sectors
  - Controversial activities
  - International norms/UN Global Compact
- 2006 Principles for Responsible Investment
  - 2006 UN PRI
  - 2006-2021 Growth of Sustainable Investments
- The key investment strategies
- 2021 EU Green Deal
  - Growth of Sustainable Investments
  - Sustainable Finance Disclosure Regulation (SFDR)
  - EU Taxonomy
  - Sustainability in MiFID
- ESG in figures
- ESG Assets Under Management (AUM)
- ESG Performances
- Febelfin Quality Label (Towards Sustainability)
- Capita Selecta
  - The Science Based Targets Initiative (SBTi)

- European ESG Template (EET)
- Sustainable Bonds
- Towards Sustainability: sustainability labels
- **Business case** of ESG fund management (Review an existing customer portfolio and optimize investments to ensure the inclusion of sustainable/ESG objectives)

Target audience: in addition to above, special interest to front office Private Banking & Retail.

## PRACTICAL INFORMATION

- **Duration:** 1 day of training (6 class hours)
- **Hours:** 09:00 to 17:00
- **Location:** Febelfin Academy: Phoenix building, Koning Albert II-laan/Boulevard du Roi Albert II 19, 1210 Brussels
- **Language:** This training will be given in English

## METHODOLOGY

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You follow a **‘Classroom training’** face-to-face in a group. You, the other participants and the teacher are all present in the same classroom at an agreed time. There is an opportunity for interaction and feedback, both from the participants to the teacher and vice versa. The teaching material consists as a basis of a presentation via the MyFA learning platform, supplemented with various other items (such as digital syllabus, presentation, audiovisual fragments, etc.).

**Course material:** PowerPoint presentation (slides);