

ESG & sustainable finance in investment funds

GOALS

This course concerns ESG & Sustainability in funds for retail, private and institutional banking portfolios.

The objective of the training is to:

- explore the origins and definitions of ESG & SRI;
- explain responsible and sustainable investing;
- define strategies towards a sustainable investor;
- learn what clients know, want to know and need to know.

SUMMARY

Category:

- Risk, finance & treasury
- Durability

Difficulty level:

Advanced

Certification type:

In class training

Price:

The joint pricing guidelines are applied as part of a joint initiative.

Points/hours:

- Bank: 3

Accreditations:

- 600.013 permanent education banking

INTENDED AUDIENCE

The training course can be followed by various target groups:

- relationship managers;
- private bankers;
- portfolio managers.

FOREKNOWLEDGE

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

CONTENT

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- Before 2006: the origins of what would become the building blocks of sustainable investing
 - Exclusions
 - Sectors
 - Controversial activities
 - International norms/UN Global Compact
 - ESG
- 2006 Principles for Responsible Investment
 - 2006 UN PRI
 - 2006-2021 Growth of Sustainable Investments
- 2021 EU Green Deal
 - Sustainable Finance Disclosure Regulation
 - EU Taxonomy
 - Sustainability in MiFID
- ESG in figures
 - AUM
 - Performance
- Capita Selecta
 - The Science Based Targets Initiative (SBTi)
 - European ESG Template (EET)
 - Sustainable Bonds
 - Towards Sustainability: sustainability labels

PRACTICAL INFORMATION

- **Duration:** ½ day of training (3 class hours)
- **Hours:** 09:00 to 12:30
- **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

You follow a **‘Classroom training’** 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.).

Training material: PowerPoint presentation.