

2026

E-LEARNING ON-DEMAND

SUSTAINABILITY TRAINING

Solutions Catalogue- Financial Sector

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Maria Maisuradze

Founder and CEO

www.ED4S.org

[Contact us](#)

WHY DOES SUSTAINABILITY TRAINING MATTER?

- Embedding **sustainability into business strategy** begins with education and creating a **common language** across the organization.
- ESG and sustainability concepts are often **complex** and can seem **disconnected from day-to-day business realities**. Building clarity and a common language is essential to turning ambition into action.
- **Upskilling employees** is the most time and resource efficient way to advance your organization's sustainability goals.
- Sustainability education will **foster innovation, strengthen cross-functional collaboration**, boost **employee engagement**, and accelerate the **implementation** of your **sustainability strategy**.

WHAT SUCCESSFUL TRAINING LOOKS LIKE

- A **meaningful program** that demonstrates **why sustainability matters** to your organization and aligns it with **your core business** and **investment strategy**.
- A **time-efficient learning path** that targets the **strategic pillars** most relevant to **each industry**, ensuring impactful engagement **across teams**.
- **Practice-driven** content that connects **sustainability to real business decisions** through **role-specific case studies, scenarios**, and **hands-on exercises**.

AN OVERVIEW OF AVAILABLE SOLUTIONS



OFF-SHELF TRAININGS

30 min to 90 minutes-training courses covering basic topics in sustainable finance, customizable with add-on 5 minutes clips on specific ESG concepts

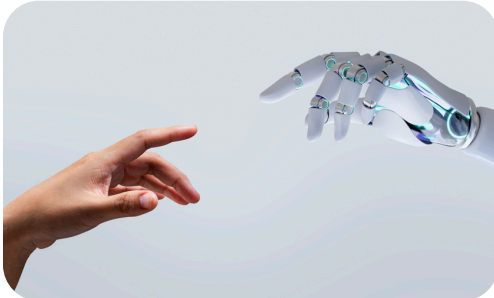
[Solution Overview](#)



CUSTOMIZE YOUR COURSE

Develop a fully custom training course for your team, meeting your business' requirements and needs

[Solution Overview](#)



ADVISORSIM: CLIENT CONVERSATION SIMULATOR

Practice your soft skills with a realist, AI-driven customized persona that simulates a client conversation

[Solution Overview](#)



LIVE TRAININGS AND WORKSHOPS

Prepare your team in a live workshop and participate in hands-on activities with an industry expert.

[Solution Overview](#)

PRE-BUILT PATHWAYS

Our pre-built learning paths provide a comprehensive introduction to sustainable finance. Participants gain a clear understanding of how integrating sustainability into daily decisions enhances resilience and long-term value.

Sustainable Finance and Investing

A foundational course on sustainable finance, ESG principles, and the role of financial institutions in allocating capital responsibly, while highlighting key regulatory and industry trends and exploring sustainable investing strategies.

60 Mins

Sustainable Lending

A highlight of the strategic role of ESG in corporate decision-making, stakeholder expectations, and industry priorities, enabling effective client engagement and ESG communication.

30 Mins

Active Ownership

A focus on investment stewardship and entire shareholder engagement process; from setting goals to impact tracking and reporting.

90 Mins

Impact Investing

A deep dive in impact investing and how financial capital can generate measurable social and environmental outcomes alongside financial returns.

90 Mins

ADD-ON VIDEO LIBRARY

Looking for more comprehensive training? Enhance our off-the-shelf courses by integrating 5-minute concept explainers tailored to your specific needs.

[View the available capsules](#)

[Discuss your needs](#)

Design a **fully customized learning experience** built directly around your sustainability strategy, goals, and disclosures.

By translating **your commitments** into **practical, role-specific actions**, we ensure employees not only understand your priorities but also know **how to contribute to measurable impact**. This tailored approach turns your sustainability report from a communication tool into a **powerful driver of organizational change** and performance.



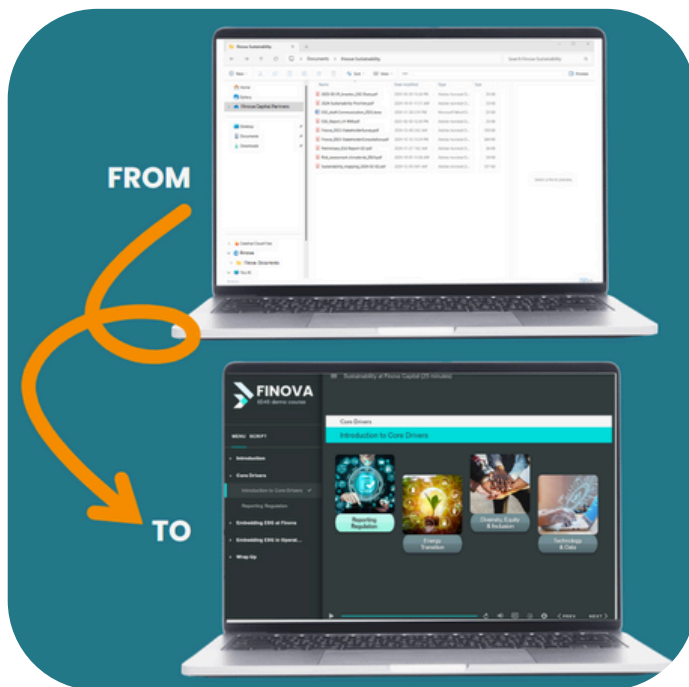
On-demand E-Learning quizzes, interactive activities



5-minute clips for a 30-60 min training



English, French, possible add-on



Leverage intuitive, **role-based e-learning** to translate your sustainability commitments into **practical daily actions** that drive results.

The solution includes **customizable content** and **scenarios** that are tailored to your products, regulatory requirements, and organizational context.

Helps employees **understand their role, build confidence, and take action** that delivers measurable impact across the organization.

[Book a demo](#)

SIMULATION TRAINING

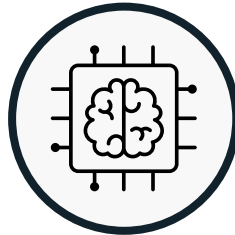
AdvisorSim : Bridge the gap between theory and client-facing excellence.

A safe, realistic platform where financial advisors practice both soft skills and technical expertise in Know your Client (KYC), sustainable investment products, commercial lending, and more. Built and audited by finance professionals, and used by CFA Institute as practical training for members.



AI CLIENT PERSONAS

Choose from existing scenarios or request your own



AI EVALUATOR

Align learner evaluation feedback with your internal best practices



HUMAN AUDIT DASHBOARD

Gain better understanding of advisor preparedness

Why it works

- Realistic scenarios adapted to new market trends and regulatory requirements.
- Full Analytics on skills gaps to uncover opportunities to improve.
- Test new advisor compliancereadiness.

1

SAFE PRACTICE

No consequence of poor performance

2

REALISTIC SCENARIOS

Customizable to your products and client types.

3

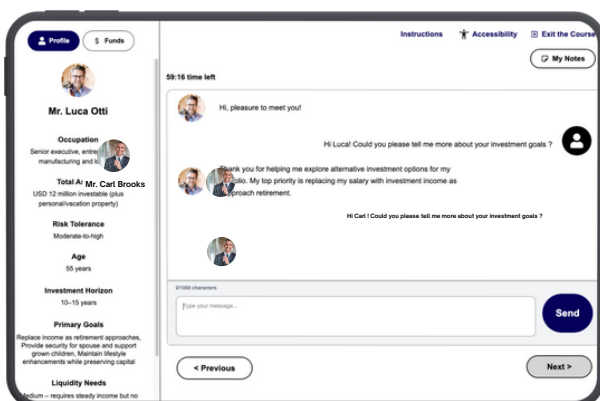
PERSONALIZED FEEDBACK

AI-driven coaching based on industry best practices.

4

SCALABLE & CUSTOMIZABLE

White-labeled, LMS-ready, and tailored to your evaluation criteria.



[Learn More](#)

LIVE TRAINING SESSIONS

Our live workshops and training sessions are delivered in private groups of up to 30 participants, offering investment managers and analysts practical, hands-on guidance to integrate sustainability and ESG considerations into their daily work.

Each session focuses on helping teams deliver sustainability impact efficiently and effectively, diving deep into key commercial aspects of ESG.

Sustainability and Transition Challenges	This introductory course reviews the history of sustainability, covers the basic elements of sustainability, presents the ecosystem, and introduces the Sustainable Development Goals (SDGs).	1 hour
ESG in Equity	A deeper dive in sustainable investment strategies, ESG risk and opportunity management, market trends, and effective application across asset classes.	1 hour
ESG in Alternative Asset Classes	A highlight of the strategic role of ESG in corporate decision-making, stakeholder expectations, and industry priorities, enabling effective client engagement and ESG communication.	1 hour
Sustainability Risk Management	This course introduces the basics of risk management, presents the role of insurance, discusses investment risk management and climate impact, and brings awareness to the climate change action program	1 hour
Governance and Behavior	This training highlights the importance of fiduciary duty, presents corporate culture, explores stewardship and engagement, and the role of the board of director	1 hour

All trainings are delivered virtually or in-person, by senior sustainable finance subject matter experts.

[View all available courses](#)

Option 1: Recommended for advisors	Sustainable Finance Assessment	Off-the-Shelf Training	Simulator-based Training
Option 2: Recommended for Investment Teams	Sustainable Finance Assessment	Off-the-Shelf Training	Simulator-based Training
Option 3: Recommended for company-wide training	Off-the-Shelf Training	Custom Course	Live Sessions and Workshops

Assess your organizational needs by visiting our website and requesting a quote. Our team of experts is available to discuss any combination of solution that is best suited for your organization based on your team size, specific sector, and learner platform needs.

Meet our Chief Learning Architect

Our technology

Our training solutions are designed to be integrated effortlessly into your organization learning platform for a seamless integration for learners. All solutions are **LMS-compliant** and are certified by the **CCPA, the GDPR**, among other. CPA credits can be received for our courses.

PLATFORM SECURITY

THROUGH PARTNERSHIP WITH THINKIFIC

You can also leverage our platform to deliver your training. Our Learning Management Platform is built on a strong foundation of security and privacy that keeps our client data secure and compliant with best practices in cybersecurity and privacy.

WHY WORK WITH ED4S

ABOUT

ED4S Academy is a top-rated ESG training provider focused on helping organizations build internal capacity to advance their sustainability strategies. We leverage the most trusted research and reputable subject matter experts globally to build top-notch courses that get our learners excited about Sustainability.

Our unique approach to partnering and co-creating with our clients allows us to build high-impact learning experiences that drive real change within an organization.

Our courses are recognized and approved by numerous professional associations and educational bodies.

OUR IMPACT

4.8/5 RATING

Learners love our custom courses



28 CUSTOM COURSES

We have built and successfully launched 28 custom training programs

“The role-based approach from ED4S was a game-changer for us. We saved months of internal development and employees highly appreciated relevant and engaging course.” – Sustainability Leader, Canadian Bank”

“All aspects of the ED4S product offering are very valuable for us. I was especially pleased with the capabilities of ED4S in collaborating with us to build a company-specific training course in addition to the well constructed conceptual training.” – Director, Global Asset Management Firm”

TRUSTED BY



OUR WORLD CLASS INSTRUCTORS



Nawar Alsaadi

Sustainable Finance Expert



Lucie Bourgeois

Corporate Strategy and
Sustainability Expert



Matt Orsagh

ESG Expert and Thought Leader



**Lorraine Spradley
Wilson**

Sustainable Finance Expert



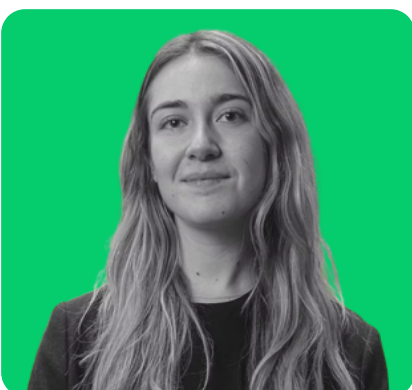
Maria Maisuradze

Chief Learning Architect



Samuel Weber

Learning Design Expert



Anaelle de Serres

Sustainability Research
Analyst



Stephen Kibsey

Risk Expert and Educator



James Atfield

ESG Research Analyst

2025

E-TRAINING SERVICES



CATALOGUE ANNEX

A detailed description of each
solution

PREBUILT PATHWAY : SUSTAINABLE FINANCE & INVESTING

OVERVIEW

This Initiation module is an ideal start for anyone working in asset management. In a highly efficient and time-sensitive way, learners will grasp the foundations of the sustainable finance; from main drivers, and global trends, to some common terminology, investment strategies and discover evolving landscape of sustainable investing.



60-75 Minutes



On-demand E-Learning
5-minute video clips
quizzes, final assessment



English, French



Investment professionals

LEARNING OUTCOMES

- ✓ Create a solid foundation and common language when it comes to sustainable investing
- ✓ Help employees understand how sustainability is reshaping the financial industry
- ✓ Acquire ability to identify various sustainable investing approaches.

CONTENT

- Sustainability and our economies
- The role of the financial institution
- ESG and materiality
- The evolution of the financial industry
- The challenges and the way forward
- The growth of sustainable investing
- The importance of sustainable investing
- The five main strategies
- Financial performance
- The challenges and the way forward

CONTENT DEVELOPED BY SUSTAINABILITY EXPERTS

Matt Orsagh, MBA, CFA | Sustainable Finance Expert, Ex. Senior Director at CFA Institute.

Clarisse Simonek, CFA | ESG Expert, Educator, Contributor to CFA's ESG Investing Certificate.

Stephen Kibsey, MBA, SIPC | Sustainability Consultant, Educator, Ex. Risk Executive.

Maria Maisuradze, CFA, FSA | Sustainability Professional, Educator, Impact Entrepreneur

Other Contributors:

Rosalie Vendette, Quinn + Partners

Emmanuel N'dri, Msc

PREBUILT PATHWAY : SUSTAINABLE INVESTING

OVERVIEW

Building upon the foundations acquired in the Sustainable Finance course, this module takes learners on the sustainable investing journey. In 30 minutes, learners will discover key concepts and strategies in sustainable investing field. This module will demystify differences between six commonly used investment approaches, financial performance and ESG considerations in the context of a fiduciary duty (KYC and KYP).



30-40 Minutes



On-demand E-Learning
5-minute video clips
quizzes, interactive activities



English, French



Investment professionals, financial
advisors, investors

LEARNING OUTCOMES

- Create a foundational understanding of sustainable investing represents and acquire awareness of its different flavours and approaches.
- Improve communications and trust when discussing ESG and sustainability topics with colleagues, partners and clients.
- Acquire ability to identify various sustainable investing approaches.

CONTENT

- The growth of sustainable investing
- The importance of sustainable investing
- The five main strategies
- Financial performance
- The challenges and the way forward

CONTENT DEVELOPED BY SUSTAINABILITY EXPERTS

Matt Orsagh, MBA, CFA | Sustainable Finance Expert, Ex. Senior Director at CFA Institute.

Clarisse Simonek, CFA | ESG Expert, Educator, Contributor to CFA's ESG Investing Certificate.

Stephen Kibsey, MBA, SIPC | Sustainability Consultant, Educator, Ex. Risk Executive.

Maria Maisuradze, CFA, FSA | Sustainability Professional, Educator, Impact Entrepreneur

PREBUILT PATHWAY : SUSTAINABLE LENDING

OVERVIEW

This 30-minute module builds on the Sustainable Finance course, guiding learners through the sustainable lending journey. It explores how ESG factors impact financial performance, enhance risk profiles, and boost corporate resilience. Learners gain practical insights and key steps to confidently engage in sustainable lending conversations with clients across industries.



30–40 Minutes



On-demand E-Learning
5-minute video clips
quizzes, interactive activities



English, French



Business lending professionals,
financial advisors, account
managers, strategic advisors

LEARNING OUTCOMES

- ✓ Understand the importance of considering ESG factors in strategic decisions
- ✓ Gain confidence in discussing ESG and Sustainability strategy and targets
- ✓ Be better equipped for the more complex and demanding world of business and finance

CONTENT

- What is sustainable financing?
- Why should companies care about ESG?
- Business resilience
- Tailoring conversations to business clients
- Financing the transition to a sustainable economy

CONTENT DEVELOPED BY SUSTAINABILITY EXPERTS

Matt Orsagh, MBA, CFA | Sustainable Finance Expert, Ex. Senior Director at CFA Institute.

Lucie Bourgeois, ASC, C.Dir., M.Sc | Corporate Strategy Consultant, Sustainability Expert

Stephen Kibsey, MBA, SIPC | Sustainability Consultant, Educator, Ex. Risk Executive.

Maria Maisuradze, CFA, FSA | Sustainability Professional, Educator, Impact Entrepreneur

PREBUILT PATHWAY : ACTIVE OWNERSHIP

OVERVIEW

This is one of a kind foundational course that focuses on shareholder engagement and lays out whole shareholder engagement process; from setting the goals to impact tracking and reporting.



1.5 hours



On-demand E-Learning
5-minute video clips
quizzes, interactive activities



English



Investment professionals

LEARNING OUTCOMES

- ✓ Gain an understanding of what is active ownership and how it can be used to drive environmental, social and governance (ESG) impact.
- ✓ Gain an ability to set engagement goals, and how to identify relevant objective metrics to engage on
- ✓ Learn how to prepare and develop a complete and effective engagement plan.
- ✓ Discover how to embed the engagement function within your organization.
- ✓ Learn how to report, track, and communicate your engagements.

CONTENT

- Introduction
- Goals, objectives, and metrics
- Engagement process
- Case studies
- Key takeaways

CONTENT DEVELOPED BY SUSTAINABILITY EXPERTS

Nawar Alsaadi, SIPC, FSA | Sustainability Expert, Ex Senior Portfolio Manager, Author

Anja Seiler | Investment Stewardship Specialist at ETHOS

Frederic Bach, CFA | ESG Integration Specialist

Jennifer Story | Associate Director, Climate Advocacy at SHARE

Simon Rawson | Director of Corporate Engagement at ShareAction

PREBUILT PATHWAY : IMPACT INVESTING

OVERVIEW

This course is designed for professionals interested to learn about the Impact Investing field and how financial capital can be used to drive positive social and environmental outcomes.



1.5 Hours



On-demand E-Learning
5-minute video clips
quizzes, interactive activities



English



Finance professionals, investors,
foundations

LEARNING OUTCOMES

- ✓ Gain an understanding of various approaches and capital structures used in impact investing
- ✓ Identify key characteristics of impact-driven organizations
- ✓ Learn how Impact Investing can be used via various asset classes
- ✓ Gain access to methodologies and tools used in evaluating and measuring impact
- ✓ Familiarize with various standards and frameworks used in impact investing field

CONTENT

- What is Impact Investing?
- Key Concepts
- Impact measurement
- Impact portfolio
- Case studies

CONTENT DEVELOPED BY SUSTAINABILITY EXPERTS

Maria Maisuradze, CFA, FSA | Sustainability Professional, Educator, Impact Entrepreneur

Interviewed experts: Anita Nowak, PhD, Gagmawi Selassie, Kelly Gauthier, Michel Brutti

Global Goals Introduction

Explore how global goals addressing climate change, social inequalities, and nature loss shape policies and business strategies worldwide, preparing companies for future challenges.

Keywords: Sustainable finance, systemic risks, global policy, corporate strategy, climate transition, stakeholder alignment



Sustainable Development Goals (SDGs)

An overview of the 17 Sustainable Development Goals (SDGs) adopted by the United Nations in 2015, with the aim of achieving a more sustainable and equitable world by 2030.

Keywords: UN SDGs, social equity, global governance, ESG integration, long-term value



Kunming-Montreal Accord

Understand the role and targets of the Kunming-Montreal agreement in the context of the biodiversity and economic crisis.

Keywords: Biodiversity risk, nature-positive finance, TNFD alignment, ecosystem valuation, natural capital, regulatory frameworks



Natural Capital & Biodiversity

Explore the role of natural capital in the economy and why should it be considered in economic decision-making.

Keywords: Natural assets, ecosystem services, biodiversity risk management, environmental dependencies



What is ESG ?

Understand the core concepts of Environmental, Social, and Governance (ESG) and why they matter.

Keywords : ESG factors, non-financial performance, governance standards, sustainability metrics



ESG - Environmental Factors

A deep dive into environmental factors : Climate change, Biodiversity loss, Water scarcity explained.

Keywords : Carbon intensity, resource efficiency, pollution control, biodiversity impact, water management, environmental risk



ESG - Social Factors

A deep dive into social factors : Diversity and Inclusion, Human Rights, and Data Privacy explained.

Keywords : Human capital, labor standards, human rights due diligence, diversity metrics, stakeholder engagement



ESG - Governance Factors

A deep dive into governance factors : Board Independence, Cybersecurity governance, among others.

Keywords : Corporate governance, board oversight, executive accountability, cybersecurity risk, compliance, ethical conduct



ESG Data and Ratings

Learn how to use ESG data and ratings in real-world decision-making, and understand why different providers often give different ratings.

Keywords: ESG data providers, scoring methodologies, disclosure consistency, comparability, MSCI



Materiality

Distinguish the difference between single and double materiality and their relevance in ESG.

Keywords: materiality mapping, double materiality, ESG disclosure, risk relevance, sector-specific materiality



Sustainability Reporting

Explore what sustainability reporting is and how organizations communicate ESG performance (ISSB, ESRS, GRI).

Keywords: ISSB standards, ESRS, GRI framework, disclosure alignment, transparency,



GHG Accounting

Provide an overview of greenhouse gas (GHG) accounting and its importance in climate reporting.

Keywords: Scope 1-2-3, carbon accounting, emissions inventory, climate metrics, financial disclosure



GHG Protocol

An introduction to the GHG Protocol and its role in standardizing emissions measurement.

Keywords: GHG standards, ISO 14064, reporting boundaries, emissions quantification.



Net-Zero

Explore the concept of net zero and what it means for organizations and climate goals.

Keywords: Science-based targets, carbon neutrality, decarbonization pathways, offset integrity, climate commitments, net-zero transition, carbon credits



The Science Based Target Initiative (SBTi)

Understand the Science Based Targets Initiative (SBTi), a framework and tools to effectively implement the net-zero target for businesses.

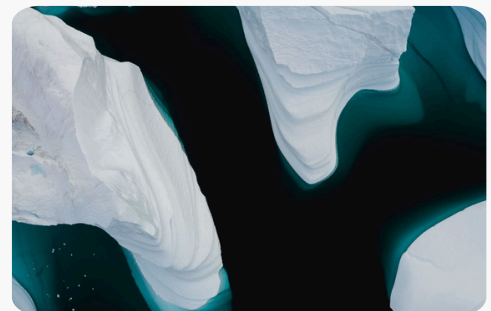
Keywords: SBTi validation, 1.5°C alignment, target setting, corporate disclosure, emissions reduction framework



Transition Pathways

Uncover what transition pathways are and how they guide progress toward net zero targets.

Keywords: transition planning, scenario analysis, portfolio alignment, emissions reduction, risk management



Climate Disclosures : IFRS-S2

Delve into the IFRS S2 Climate-Related Disclosures standards, exploring how businesses report climate-related financial risks and opportunities to enhance transparency and risk management.

Keywords : IFRS S2, TCFD alignment, financial risk disclosure, investor transparency, climate-related metrics

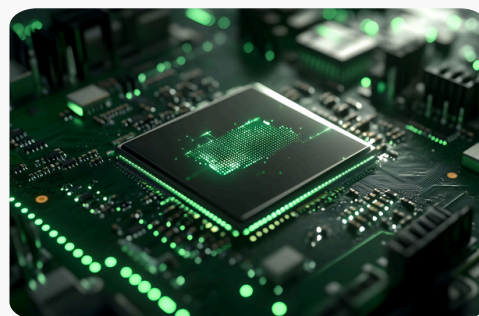


Modules Under Construction : Coming soon

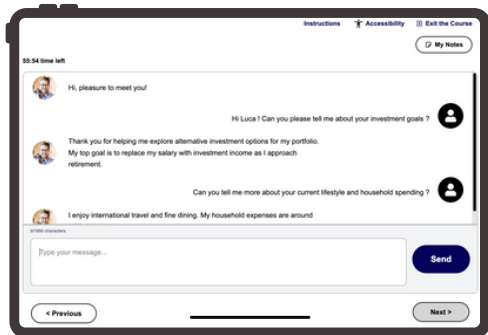
Green AI

Explore responsible AI, how technology teams can reduce the environmental footprint of AI through smarter design, training, and deployment, while balancing performance, cost, and environmental impacts.

Keywords : energy-efficient models, carbon-aware computing, sustainable AI design, model optimization, responsible AI



WHAT YOUR ADVISOR WILL LEARN

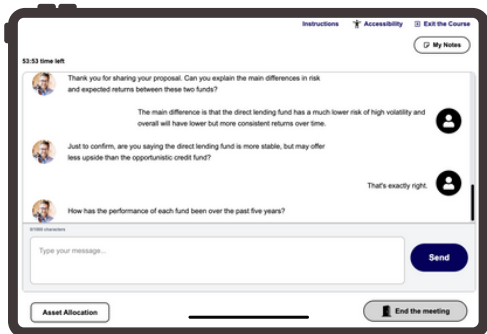
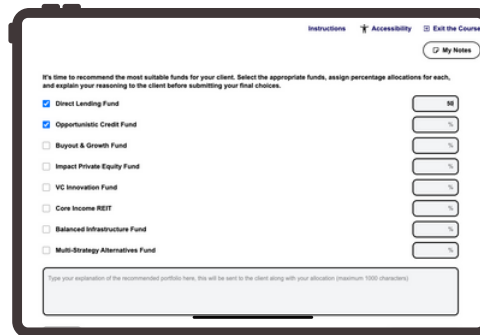


Step 1 : KYC

Select a realistic, AI-generated client persona with unique goals, personality, and preferences. Engage in an immersive, conversational simulation that mirrors real KYC interactions, exploring risk tolerance, lifestyle, and investment objectives.

Step 2 : Recommendation

Based on your assessment, create a tailored asset allocation and build your portfolio strategy. The simulator then challenges your approach with dynamic client feedback, testing your understanding of client priorities and the depth of your KYP process.

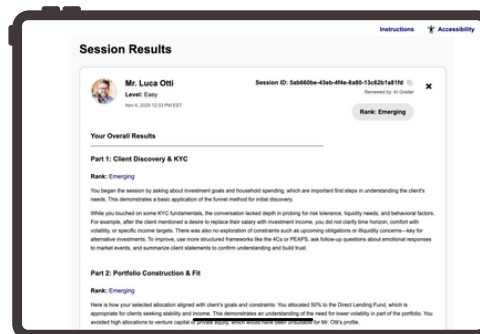


Step 3 : KYP

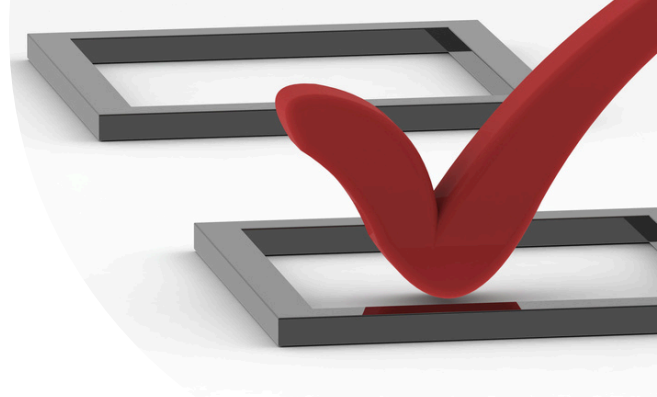
Respond to insightful, scenario-based questions from your virtual client, demonstrate your ability to simplify complex fund details and clearly communicate your investment rationale.

Step 4 : Receive Personalized Feedback

Receive personalized, AI-driven feedback on your strengths and areas for improvement, validated by financial professionals. Refine your communication, advisory, and analytical skills for a more efficient and impactful learning journey.



FULL CATALOGUE



Topic	Duration	Max participants
<u>Sustainability and Transition Challenges</u>	1 hr	50
<u>Externalities - Internalization</u>	1 hr	50
<u>Governance and Behavior</u>	1 hr	50
<u>Coalitions for Sustainable Finance</u>	1 hr	50
<u>Strategies and Intangibles</u>	1 hr	50
<u>Reporting</u>	1 hr	50
<u>Long Term Value Creation</u>	1 hr	50
<u>Sustainability Risk Management</u>	1 hr	50
<u>Equity Capital Markets</u>	1 hr	50
<u>Bond Market</u>	1 hr	50
<u>ESG in Equity</u>	3 hrs	30
<u>ESG in Fixed Income</u>	3 hrs	30
<u>ESG in Alternative Asset Classes</u>	3 hrs	30

LIVE TRAINING

SUSTAINABILITY AND TRANSITION CHALLENGES

1 HOUR

This session is an introduction to sustainability.

OBJECTIVES

- Review the history of sustainability
- Understand the basic elements of sustainability
- Introduction to Sustainable Development Goals
- Awareness of sustainability principles
- Presentation of the sustainability ecosystem

TARGET AUDIENCE

- Professionals

GROUP SIZE

- Maximum 50 participants

TECHNICAL TRAINING (VIRTUAL ONLY)

ESG IN EQUITY

3 HOURS

This course provides an in-depth examination of how ESG is incorporated into research, financial analysis and portfolio construction in equity investments. It also covers the latest thinking on how to construct portfolios that contribute to a low carbon economy. As asset managers face mounting pressure to mitigate financial and reputational risks associated with ESG and demonstrate their contribution to sustainability, it is essential to understand the various types of ESG and low-carbon funds, biases inherent in portfolio construction, effective forms of engagement, and key characteristics of different ESG rating data providers. Additionally, the course also explores increasing regulation and client expectations around disclosure and labelling.



OBJECTIVES

- Gain an understanding of the integration of ESG factors into financial analysis and portfolio construction for equity investments.
- Learn about the latest methods and strategies for constructing portfolios that contribute to a low-carbon economy.
- Identify and mitigate the biases that may affect ESG portfolio construction and engagement.

TARGET AUDIENCE

- Investment teams

GROUP SIZE

- Maximum 30 participants

TECHNICAL TRAINING (VIRTUAL ONLY)

ESG IN ALTERNATIVE ASSET CLASSES

3 HOURS

This course focuses on the integration of material ESG factors in private equity, real estate and infrastructure, including similarities and differences in the due diligence process and the typical ways in which impact is measured and reported. The long-term nature of real assets allows for material ESG issues such as extreme weather, water stress, and community relations to have a significant impact on the viability and return of the asset. On the other hand, the general lower liquidity characteristic enhances these long-term risks as well, impacting not only cashflow, but also selling price/terminal value. Participants will learn about the risks and opportunities presented by sustainability megatrends, as well as how to identify potential ESG-related risks and opportunities for portfolio companies. The course will also cover how to engage with portfolio companies on ESG issues and promote ESG integration throughout the investment process.

OBJECTIVES

- Understand the due diligence process for integrating ESG in private equity, real estate, and infrastructure investments.
- Learn about the risks and opportunities presented by sustainability megatrends and how to identify potential ESG-related risks and opportunities for portfolio companies.
- Develop the skills to engage with portfolio companies on ESG issues and promote ESG integration throughout the investment process.
- Gain insights into how material ESG issues, such as extreme weather, water stress, and community relations, impact the viability and return of real asset investments, and learn how to measure and report impact.

TARGET AUDIENCE

- Investment teams

GROUP SIZE

- Maximum 30 participants

LIVE TRAINING

SUSTAINABILITY RISK MANAGEMENT

1 HOUR

This session is a discussion on resilience.

OBJECTIVES

- Introduction to the basics of risk management
- Understand the role of insurance
- Awareness of a climate change action program
- Discussion on investment risk management
- Presentation of climate impact

TARGET AUDIENCE

- Professionals

GROUP SIZE

- Maximum 50 participants

LIVE TRAINING

GOVERNANCE AND BEHAVIOR

1 HOUR

This session is a discussion on governance.

OBJECTIVES

- Introduction of the importance of fiduciary duty
- Understand the corporate culture
- Awareness of a board of director's role
- Discussion on stewardship and engagement
- Presentation of a sustainability leader

TARGET AUDIENCE

- Professionals

GROUP SIZE

- Maximum 50 participants

LIVE TRAINING

EXTERNALITIES - INTERNALIZATION

1 HOUR

This session is a discussion on the issues facing sustainability.

OBJECTIVES

- Introduction of the vastness of issues
- Understand the stakeholder theory
- Awareness of why externalities matter
- Discussion on scenario analysis
- Presentation of the sustainable marketing

TARGET AUDIENCE

- Professionals

GROUP SIZE

- Maximum 50 participants

LIVE TRAINING

COALITIONS FOR SUSTAINABLE FINANCE

1 HOUR

This session is a discussion on the organizations which entertain sustainability.

OBJECTIVES

- Introduction of the evolving investment theory
- Understand the business case for sustainability
- Awareness of the investors' role in sustainability
- Discussion on sustainability initiatives
- Presentation of a legal framework for sustainability

TARGET AUDIENCE

- Professionals

GROUP SIZE

- Maximum 50 participants

LIVE TRAINING

STRATEGIES AND INTANGIBLES

1 HOUR

This session is a discussion on the changing business models.

OBJECTIVES

- Introduction to adapting to sustainability
- Understand the concept of dual materiality
- Awareness of the current issues
- Discussion on Sustainable Development Goals
- Presentation of branding in sustainability

TARGET AUDIENCE

- Professionals

GROUP SIZE

- Maximum 50 participants

LIVE TRAINING

REPORTING

1 HOUR

This session is a discussion on disclosing information.

OBJECTIVES

- Introduction to importance of metrics
- Understand the role of accounting
- Awareness of greenwashing
- Discussion on transparency in communications
- Presentation of sustainability reporting

TARGET AUDIENCE

- Professionals

GROUP SIZE

- Maximum 50 participants

LIVE TRAINING

EQUITY CAPITAL MARKETS

1 HOUR

This session is a discussion on the stock market.

OBJECTIVES

- Introduction to the basics of equity market
- Understand the role of integrating sustainability into equity investing
- Awareness of the need for a philosophy and process
- Discussion on emerging risks
- Presentation of impact investing tools

TARGET AUDIENCE

- Professionals

GROUP SIZE

- Maximum 50 participants

LIVE TRAINING

BOND MARKET

1 HOUR

This session is a discussion on the fixed income market.

OBJECTIVES

- Introduction to the basics of green and social bonds
- Understand the role of green taxonomy
- Awareness of the need for a sustainable banking systems
- Discussion on integrated systems thinking

TARGET AUDIENCE

- Professionals

GROUP SIZE

- Maximum 50 participants

LIVE TRAINING

LONG TERM VALUE CREATION

1 HOUR

This session is a discussion on value.

OBJECTIVES

- Introduction to the evolving role of an investment portfolio manager
- Understand the role of flow of funds and stakeholder influence
- Awareness of impact investing
- Discussion on green taxonomy
- Presentation of sustainability investment products

TARGET AUDIENCE

- Professionals

GROUP SIZE

- Maximum 50 participants

TECHNICAL TRAINING (VIRTUAL ONLY)

ESG IN FIXED INCOME

3 HOURS

This course offers an in-depth understanding of the relationship between ESG and fixed income asset classes, including corporate, agencies, and sovereigns. It covers ESG megatrends, how ESG impacts fixed income, and identifying trends in materiality, allowing participants to develop a comprehensive understanding of ESG risks across different time frames, and geographies. The course also includes as broadening perspectives on physical vs transition risk. Participants will gain an understanding of how ESG impacts listed bond portfolios, including its impact on spreads and credit ratings, and the differences between various ESG bonds in portfolio construction. Furthermore, participants will learn about the market tools for assessing and reporting ESG, including relevant data providers and how they compare. They will understand strategies for engagement, including new forms of engagement, such as with sovereigns. This course provides an essential framework for financial professionals looking to incorporate ESG factors into their fixed-income investment strategy, helping them to manage ESG risks.

OBJECTIVES

- Develop a comprehensive understanding of the relationship between ESG and fixed income asset classes, including corporate, agencies, and sovereigns.
- Identify and analyze ESG megatrends and trends in materiality to gain insights into ESG risks across different time frames and geographies.
- Understand the impact of ESG on listed bond portfolios, including its effect on spreads and credit ratings, and how to construct portfolios using various ESG bonds.
- Learn about market tools for assessing and reporting ESG, such as relevant data providers and engagement strategies, including new forms of engagement with sovereigns, to manage ESG risks in fixed-income investment strategies.

2025

E-TRAINING SERVICES



THANK YOU

Contact us to get a quote, a demo,
and assistance in choosing the
solution best suited for your needs.



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