



DURATION

2 Days



DELIVERY CHANNEL

Virtual
Instructor-Led
Training



PROGRAM LEVEL

Foundational to
Intermediate

PREREQUISITES

None

ADVANCE PREPARATION

None

Overview

Environmental, social, and governance (ESG) is becoming an increasingly important measure of corporate performance. A growing number of investors are demanding ESG disclosure and reporting, and lenders are integrating ESG assessment tools into their decision-making and policies.

Financial services professionals, managers, and executives must now rise to the challenge of integrating ESG into their corporate strategies while mitigating risks to the bottom line.

Who Should Attend

ESG and Business Strategy is suitable for a variety of financial services professionals, including:

- » Portfolio/asset/fund managers
- » Credit analysts
- » Rating advisors
- » Equity analysts
- » Credit risk professionals
- » Asset owners
- » Investment and commercial bankers
- » Financial regulators

Course Benefits

By the end of this seminar, you will be able to:

- » Understand ESG and its impact on the financial services industry
- » Identify major ESG regulatory developments, trends, and market practices
- » Integrate ESG issues into thinking, decision-making, and reporting
- » Understand, analyze, and provide recommendations on ESG assessment and mitigation
- » Understand and evaluate the correlation between ESG and corporate financial performance
- » Understand the methodologies for calculating social return on investment and social impact assessment

Course Agenda

MODULES	TOPICS
1 Understanding ESG and its Importance	1 What Is ESG?
	2 ESG Challenges to Financial Services
	3 Understanding a Circular Economy
	4 From Profits to Purpose
	5 Redefining Value in an ESG Economy
2 Global Frameworks and Taxonomies	6 The Basic Elements of Taxonomy
	7 EU Taxonomy as a Tool
	8 Minimum Safeguards
	9 Potential Uses of Taxonomies
	10 Regulations and Regulatory Bodies
	11 Principles of Responsible Banking and Sustainable Investment
	12 Regulatory Technical Standards
	13 Taxonomies to Consider
	14 ESG at Moody's
	3 Sustainability
16 The Sustainability Journey	
17 7 Sins of Greenwashing	
15 Developing a Sustainability Strategy	
18 Sustainable Development Goals <ol style="list-style-type: none">1. The Role of Businesses with SDG Integration2. The Value Chain3. Tools	
19 Horizon 2020	
20 Sustainability Policy	
21 Sustainable Finance Products	
22 Green Bond Principles	
23 ESG Loan Categories and Sustainability-Linked Loans	
24 ESG Integration in Banks	

MODULES	TOPICS
4 ESG Strategy	25 10 Reasons for an ESG Strategy
	26 How Organizations Transform
	27 Challenges and Opportunities Associated with Integrating ESG into Business Strategy
	28 Corporate Governance and ESG Sustainability
	29 The ESG and Sustainability Professional
	30 Investor Priorities
	31 Stakeholder Engagement
5 Risk Assessment and Mitigation	32 Sustainability and Risk Management
	33 Risk, Return, and Growth Opportunities
	34 ESG Metrics and Risk
6 Measurement, Management, and Reporting	35 Corporate Performance Areas and Impact on the Bottom Line
	36 Materiality Analysis
	37 Sustainability Reporting Standards <ol style="list-style-type: none"> 1. The Global Reporting Initiative 2. United Nations Global Impact 3. ISO 26000 4. EvoVadis Assessment Framework 5. International Integrated Reporting Framework
	38 Measuring Greenhouse Gas Emissions
	39 Task Force on Climate-Related Financial Disclosures – Recommendations and Risks
	7 Developing a Framework for Your Organization
41 CapEx and OpEx	
42 Defining Key Performance Indicators	
43 Demonstrating the Financial Value of Sustainability	
44 Building Your ESG Strategy and Roadmap	

Why Moody's Analytics?

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GROUP DISCOUNTS

Special rates may be available for multiple course or group bookings. Please contact us for details.

FEES AND CANCELLATIONS

The fee listed is per participant. Course fees do not include tax, transportation or hotel accommodations. Payment must be received in full prior to the start of the course. Registrations may be canceled in writing via letter or email at least 30 days before the first date of the training for a full refund. Cancellations received less than 30 days in advance are eligible for substitution with another course, but fees will not be refunded. We reserve the right to cancel or reschedule courses at any time. For further information on our refund and complaint policy, please contact us.

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