

Online e-learning tool on sustainable investment

EXPLORE MYTHS CONCERNING SUSTAINABLE FINANCE AND DISCOVER THE TRUTH	MYTH 1 SUSTAINABLE INVESTMENT = SACRIFICING PERFORMANCE
	MYTH 2 SUSTAINABLE FINANCE WILL REMAIN A NICHE
	MYTH 3 CLIENTS ARE NOT INTERESTED IN SUSTAINABLE INVESTMENT!

The SSF e-learning course explains how the fundamental changes taking place in the world and the global economy have influenced more and more asset owners towards the integration of Sustainability into their investment decision-making process. The course aims to help investment professionals understand the implications of this accelerating trend for the finance sector as well as the business opportunities offered by sustainable investment.



Content:

- 4 extensive e-learning modules
- Contains case studies for an interactive learning experience of practical value
- Encompasses a tool for sustainability profiling of clients

The modules were created by the SSF education work group in collaboration with Edmond de Rothschild Group, under the lead of Kate Cacciatore (Global Head Sustainability, Edmond de Rothschild group) and SSF workgroup coordinator Jean Laville (Deputy CEO, SSF).

For the time being, the online e-learning tool is **offered exclusively to SSF members and partners**. If you are interested in learning more about SSF, do not hesitate to contact us by email.

info@sustainablefinance.ch

MODULE 1

WHAT IS SUSTAINABILITY & WHAT ARE THE IMPLICATIONS FOR THE FINANCE SECTOR?

You will understand the driving forces of sustainability and sustainable investment at a wider societal level.



VALUE CHAIN FOCUS

Introduction: What is Sustainability and what are the implications for the Finance Sector?

You will understand the driving forces of sustainability and sustainable investment at a wider societal level.



INTERACTIVE CASE STUDY

Select from a list of companies for your personal investment portfolio. Go back in time to remember the massive shift in the economy at the end of the 19th century/early 20th century as a result of the emergence of the automobile and the end of private investments in railways. Discover the parallel with what is happening today with the shift to a low carbon economy and the drastic implications for companies in the energy and transport sectors. With this knowledge go back to your selection of companies for your personal portfolio and decide if you will make any changes.

MODULE 2

THE DRIVING ROLE OF ASSET OWNERS IN THE SUSTAINABLE VALUE CREATION PROCESS

You will understand why and how institutional investors are increasingly choosing sustainable investment, and the implications for asset managers.



VALUE CHAIN FOCUS

The driving role of institutional Asset Owners in the sustainable value creation process and the implications for Asset Managers.

You will take the perspective of institutional asset owners and understand why and how they are increasingly choosing Sustainable Investment and what are the implications for asset managers.



INTERACTIVE CASE STUDY

Match the right titles with the definitions of the main sustainable investment strategies. As an asset manager, respond to the RFP of a major pension fund, adhering to their Responsible Investment Policy and Guidelines. Build the portfolio by selecting from a list of 8 stocks. Choose a fund for the core equities component or satellite component dedicated to thematic funds and impact investing.

MODULE 3

THE INTEGRATION OF SUSTAINABILITY IN COMPANY BUSINESS MODELS & STRATEGY, AND THE IMPLICATIONS FOR COMPANY ANALYSIS AND VALUATION

You will understand the importance of sustainability and ESG issues for company performance



VALUE CHAIN FOCUS

The Integration of Sustainability in company business models & strategy, and the implications for company analysis and valuation.

You will take the perspective of analysts/fund managers and you will understand the importance of Sustainability at company level and the impact ESG issues can have on the economic and financial performance of companies.



INTERACTIVE CASE STUDY

Play the role of a fund manager looking to manage ESG (Environmental, Social and Governance) risk and identify ESG opportunities. Match 3 ESG issues/risks with 3 companies and discover the actual impact and financial consequences in each case. Match 3 ESG opportunities with 3 companies and discover more about the positive impact on performance.

MODULE 4

ENHANCING THE VALUE PROPOSITION FOR PRIVATE BANKING CLIENTS THROUGH SUSTAINABLE INVESTMENT

You will understand the opportunity that sustainable investment represents to help private banks respond to the changing values and expectations of their clients and some of the ways to engage with clients on this subject.



VALUE CHAIN FOCUS

Enhancing the value proposition for private banking clients through Sustainable Investment.

You will take the perspective of Relationship Managers in Private Wealth Management and you will understand the opportunity that Sustainable Investment represents to help banks respond to the changing values and expectations of their clients, and some of the ways to engage with clients on this subject.



INTERACTIVE CASE STUDY

Learn how to build the investment profile of a client, starting by building your own personal profile across 6 categories: sensitivity to environmental issues; sensitivity to social issues; identification of strong specific ethical values; preference for investing in the most responsible companies; preference for active ownership of companies; strong desire to contribute to UN Sustainable Development Goals in developing countries. Discover the context and answer the questions enabling you to evaluate the level of client interest in these 6 categories. Extract your personal and/or client profile as a reference document to help you in your discussions with the client.