MERCURY

Sustainable Investment: ESG Analysis and Financial Profitability

7 – 11 March 2027
Sharm El-Sheikh (Egypt)



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Sustainable Investment: ESG Analysis and Financial Profitability

Ref: 15489_1079188 **Date:** 7 – 11 March 2027 **Location:** Sharm El-Sheikh (Egypt) **Fees:** 4500 Euro

Introduction:

In this ESG Analysis and Sustainable Investment for Financial Profitability course, participants will explore ESG investing, which refers to investing by ESG considerations, socially responsible investing in companies that are not detrimental to society but contribute to positive societal change through their positive social and environmental profiles. Value-based investing adds ESG considerations to traditional security analysis.

On the contrary, values-based investing screens/filters companies based on an investor's values/beliefs. In between these are the implementations of ESG, which this ESG Analysis and Sustainable Investment for Financial Profitability training will cover. Participants will delve into the essence of ESG financial planning, how ESG financial analysis guides investment decisions, and how ESG financial reporting integrates with corporate transparency to inform stakeholders.

This ESG Analysis and Sustainable Investment for Financial Profitability course will prepare participants to become proficient ESG financial analysts capable of evaluating ESG financial performance and its long-term sustainability and profitability implications. Participants will learn the importance of ESG principles and how integrating ESG and sustainable investing contributes to market stability and long-term value creation.

Participants in this ESG Analysis and Sustainable Investment for Financial Profitability training will scrutinize ESG in the context of sustainable investing and examine how the strategic combination of ESG analysis tools with investment decisions can optimize financial profitability without sacrificing ethical standards or environmental stewardship.

Targeted Groups:

- Financial Analysts.
- Investment Managers.
- ESG Analysts.
- Corporate Sustainability Officers.
- Portfolio Managers.
- Institutional Investors.
- Risk Management Professionals.
- Corporate Governance Specialists.
- Asset Managers.
- Environmental Consultants.

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Targeted Competencies:

At the end of this ESG Analysis and Sustainable Investment for Financial Profitability training, the participant's competencies will be able to:

- ESG Risk Assessment.
- Sustainable Investment Strategies.
- Financial Performance Analysis.
- Corporate Social Responsibility CSR Integration.
- Environmental Impact Evaluation.
- Stakeholder Engagement.
- Ethical Decision-Making.
- Regulatory Compliance in ESG.
- Portfolio Diversification.
- Long-term Value Creation.

Course Objective:

At the end of this ESG Analysis and Sustainable Investment for Financial Profitability course, the participants will be able to:

- Determine Negative screening and Positive screening.
- Determine Best-in-class screening.
- Full integration to explicit inclusion of ESG factors into traditional security analysis.
- Overlay/portfolio tilt.
- Look for ways to prevent risk factor/risk premium investing.
- Analyze ESG information to determine systematic risk.
- Focus on Thematic investing.

Course Outlines:

Unit 1: Introduction to Analysis of the ESG factor and its impact on financial profitability:

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- Negative effects of capitalism and production on the world.
- Frameworks and actions to drive the change:
    - Global Regulation and Governments' Actions: The UNFCC.
    - The Kyoto Protocol.
    - The Paris Agreement.
    - The 2030 Agenda and the SDGs.
- Actions from companies: industrial and financial alliances and/or frameworks.

Unit 2: ESG and Sustainability in Investments: the concrete side:

- Definition of ESG concept.
- ESG Scoring: different approaches and their background logic.
- Applying the ratings: investment approaches and sustainable financial instruments.

Unit 3: Is ESG-Based Investing Profitable?

- Market perspective: historical performance indicators.
- Literature's Debate on ESG Factor's Impact on Credit Risk Ratings.
- Internal perspective: effects on Corporate Intrinsic Valuation:
    - Net Sales.
    - Operating Costs.
    - Financial Costs and DCF Valuation.
- Transaction perspective: effects on relative valuation.

Unit 4: Analysis of ESG Positive Impact on Financial Performances:

- Portfolio analysis:
    - Companies.
    - Data.
    - Methodology.
    - Results.

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Unit 5: Portfolio analysis: Funds:

- Data.
- Methodology.
- Results.