



Sustainable Investment: ESG Analysis and Financial Profitability

09 - 13 Mar 2025
Amman (Jordan)



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Ref.: 15489_309918 **Date:** 09 - 13 Mar 2025 **Location:** Amman (Jordan) **Fees:** 2900 Euro

Introduction:

ESG investing refers to investing in line with ESG considerations; socially responsible investing in companies which are not detrimental to a society, but which contribute towards positive societal change through their positive social and environmental profiles.

Value-based investing adds ESG consideration on top of traditional security analysis, on the contrary, values-based investing screen/filter companies based an investor's values/beliefs. In between these exist the specific implementations of ESG that we aim to highlight through this training.

Course Objective:

At the end of this 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 to prevent Risk factor/risk premium investing
- Analyze ESG information in determination of systematic risk.
- Focus on Thematic investing.

Course Outlines:

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

- Negative effects of capitalism and production on the world
- Frameworks and actions to drive the change
 - Global Regulation and Governments' actions: The UNFCCC
 - 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

Unit 5: Portfolio analysis: Funds

- Data
- Methodology
- Results



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