Understanding RI is an introduction to responsible investment. The course provides insights into the materiality of environmental, social and governance (ESG) issues and introduces a systematic approach to incorporating ESG factors in investment decisions and active ownership.

WHO IS IT FOR?
The course is designed for industry professionals who want to improve their understanding of ESG factors. It is suitable for anyone working in investment management, financial advice, consulting, product development, sales & distribution, as well as those with a general interest in sustainable financial markets. The skills and knowledge acquired are relevant to all asset classes.

YOU WILL LEARN HOW TO:
- Define responsible investment
- Recognise ESG issues, trends and themes
- Compare traditional analysis versus ESG analysis and how this relates to investment decision making
- Recognise the key material impacts of corporate governance
- Identify the role and outcomes of engagement

"I found this course easy to use. It was clear and concise and educational. I would recommend it to my peers."

James Crossley, Head of UK Retail Sales, Legal & General Investment Management
### Course Modules and Learning Outcomes

#### What is RI
- Define responsible investment
- Recognise ESG issues, trends and themes
- Identify the relationship between ESG analysis and investment decision making

#### Active Ownership
- Define active ownership and the actions which fall under it
- Outline the principles of developing an active ownership approach
- Identify the different types of engagement and their applications

#### Environmental Issues and Investment
- Define environmental issues
- Understand environmental trends and their implications
- Recognise how environmental issues materialise at regional, industry and company level

#### Social Issues and Investment
- Recognise social factors in financial analysis
- Understand the importance of considering social issues in investment decisions

#### Governance Issues and Investment
- Understand the material impacts of corporate governance
- Recognise corporate governance factors in financial modelling

#### Financial Analysis and RI
- Define integrated analysis
- Understand types of ESG information and how it complements traditional financial analysis
- Understand the steps to perform an integrated company analysis

#### RI in Fixed Income
- Identify approaches to ESG incorporation in fixed income
- Understand differences in active ownership in fixed income and listed equity
- Describe different means of engagement in fixed income with issuers

#### Case Studies
- Environmental case study: BP
- Social case study: Facebook
- Governance case study: Volkswagen

"Understanding RI is a great tool to capture the basics of responsible investments. The course includes a fundamental understanding of ESG megatrends and strategies as well as real life cases and self-testing."

Maria Nordqvist, Head of Responsible Investments, Lannebo

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