ADVANCED RESPONSIBLE INVESTMENT ANALYSIS

Advanced RI Analysis provides an in-depth look at the use of sustainability data in fundamental investment analysis and stock valuation. The course helps investment practitioners develop a keen awareness of ESG factors and an understanding of when, where and how non-financial information can be used to add value in the investment decision making process.

WHO IS IT FOR?
The course targets investment professionals seeking to identify new value drivers in financial analysis and apply practical tools to modelling. It is suitable for analysts, investment specialists, portfolio managers, research heads and others directly involved in investment and ownership decisions. The course is focused on listed equity analysis, but the methodologies and approaches covered are relevant to wider investment decisions in a variety of asset classes.

YOU WILL LEARN HOW TO:
- Identify ESG factors and indicators that will affect financial performance
- Understand how to assess the materiality of ESG factors
- Understand the approaches and options for ESG analysis and integration
- Apply ESG factors in financial models
- Identify the many uses of sustainability data
- Evaluate how a company's fair value is impacted when adjusted to ESG performance
- Recognise global sustainability standards and regulations, and understand their impact on business

“PRI’s course is a useful tool to start integrated analysis of companies. Indeed, PRI’s integrated approach might become a standard in fundamental analysis of companies.”

Vittore Greggio, Portfolio Manager, Zarattini Bank

THE PRI ACADEMY TRAINING IS

PRACTICAL AND APPLIED
DESIGNED BY SUBJECT MATTER EXPERTS
AVAILABLE GLOBALLY
FLEXIBLE AND WEB-BASED
INTRODUCTION
- Understand ESG information uses
- Identify the role of intangible value drivers in investment decision making

THE CASE STUDY
- Define integrated analysis
- Identify the relationship between ESG data and materiality
- Understand the basic concepts needed to identify factors with the most material financial value

STEP 1: IDENTIFY
- Identify ESG factors in traditional sector analysis
- Outline key environmental, social and business indicators that can impact financial value
- Identify global trends and regulations and their impact on financial analysis
- Map ESG factors in hypothetical case studies
- Measure the extent to which ESG issues will impact certain financial metrics

STEP 2: ASSESS AND ANALYSE
- Assess the degree to which ESG factors affect industry and company performance
- Identify the guiding principles for assessing ESG issues
- Assess ESG issues using risk mapping methodologies
- Evaluate revenue, profit margins and operations using ESG data
- Assess and rank companies according to key ESG factors

STEP 3: MODEL AND INTEGRATE
- Understand the guiding principles of ESG integration
- Examine a DCF model with an ESG overlay
- Identify the entry points for ESG analysis in an EP model
- Rank and score company performance
- Recognise varying options of ESG analysis and integration

USING ESG INFORMATION PRINCIPLES
- Identify the many uses for sustainability data
- Recognise and apply the key principles of ESG analysis
- The role of ESG data in direct financial modelling

SOURCING ESG INFORMATION
- Identify the range of ESG data available
- Understand how to use multiple forms of ESG data
- Recognise the challenges faced in collecting ESG data
- Identify global initiatives, regulations and tools that support ESG integration
- Understand the role of reporting

“This course gives a good and complete overview of how to integrate ESG factors in fundamental analysis. The course material is relevant, practical and the real-case examples are interesting. This course discusses a sound framework for portfolio managers and analysts that want to do more with ESG integration.”
Leon Nauta, Senior ESG Advisor, RepRisk

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