Applied RI is our flagship training programme, providing a comprehensive examination of responsible investment from theory to practice. The course trains investment professionals to identify and analyse material environmental, social and governance (ESG) factors and to incorporate these factors into their investment decisions and ownership activities.

WHO IS IT FOR?
The course is designed for investment professionals. It is suitable for sustainability and ESG specialists, analysts, portfolio and fund managers, investment consultants and others working in the financial and professional services industry. The skills and knowledge acquired can be applied to all asset classes.

YOU WILL LEARN HOW TO:
- Define responsible investment
- Recognise material ESG issues, trends and themes and how these fit into models and ratio work
- Compare traditional analysis versus ESG analysis and how this relates to investment decision making
- Understand practical approaches for ESG analysis at global, regional, industry and company level
- Identify corporate governance processes, best practice, key standards, frameworks and stakeholders
- Understand models of engagement and design an engagement policy
- Identify key considerations to implement a successful company-wide responsible investment programme
- Integrate ESG data in financial modelling and assess ESG performance

“A terrific introduction for financial professionals looking into ESG’s possibilities.”

Michael Scanlon, Executive Director, MSCI

THE PRI ACADEMY TRAINING IS

- PRACTICAL AND APPLIED
- DESIGNED BY SUBJECT MATTER EXPERTS
- AVAILABLE GLOBALLY
- FLEXIBLE AND WEB-BASED
## INTRODUCTION TO RI
- Define responsible investment and outline its drivers
- Understand the business case for responsible investment
- Define sustainability and its three pillars
- Differentiate between ESG issues, data and factors
- Identify key ESG regulation
- Understand ESG issues can manifest at a global, regional, country-specific, industry and company level
- Discuss the risk and opportunities for investors created by ESG issues at all levels in which they manifest

## ESG INCORPORATION
- Understand different ways ESG can be incorporated into investment decision-making
- Understand how ESG information enhances traditional financial analysis
- Identify different types of ESG information relevant to financial analysis
- Understand elements of ESG analysis, including the role of materiality
- Apply a framework for ESG integration for company-specific analysis
- Understand how to integrate ESG data into financial models and ratio work

## RI AND CORPORATE GOVERNANCE
- Identify key corporate governance issues
- Understand why corporate governance is important to investors
- Understand the main corporate governance principles
- Recognise best practices in corporate governance

## RI AND THE ENVIRONMENT
- Define environmental issues
- Understand the relationship between business activities and ecosystem services
- Identify environmental megatrends
- Identify approaches to environmental analysis at a country, sector and company level

## STEWARDSHIP
- Identify the elements of a stewardship policy
- Understand engagement and voting processes
- Recognise the different approaches to engagement
- Explain how the outcomes of engagement activities impact investment decisions, and how voting strengthens engagement
- Identify evolving standards and practices in stewardship across asset classes

## RI AND CLIMATE CHANGE
- Describe the impacts of climate change on our planet, industry, investment performance
- Differentiate between transition and physical risks
- Outline policy actions implemented to country climate change
- Identify starting points for embedding responsible investment into your investment practices, including conducting climate risk assessments

## IM实PLIGHTING A RI PROGRAMME
- Understand the investment value chain, investment objectives and client preferences
- Identify the people, processes and tools related to responsible investment implementation
- Identify the areas and elements to consider when implementing a successful responsible investment programme
- Understand the role and requirements of the PRI, including the information you need for internal and external reporting on your responsible investment activities

## RI AND SOCIETY
- Identify social issues
- Outline the relationship between social issues, companies and investors
- Assess the investment implications of human rights
- Identify approaches to social analysis at a country, sector and company level

## NEW FEATURES
- Explanatory videos from PRI experts
- Dedicated module on climate change
- Updated policy and regulatory content
- Practical examples of ESG in fixed income
- Capstone case study: Tesla

Visit our website or contact us for more information

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International E-Learning Awards 2020
Honorable Mention