Foundations in 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 integrate sustainability data into financial modelling and existing investment processes.

WHO IS IT FOR?
The course is designed for investment professionals who oversee the research and incorporation of ESG criteria in their roles. It is suitable for ESG specialists, research analysts, portfolio and fund managers, investment consultants and members of senior management. 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

"PRI's Foundations in RI course is a terrific introduction for financial professionals looking into ESG's possibilities."

Michael Scanlon, Executive Director, MSCI
## COURSE MODULES AND LEARNING OUTCOMES

### INTRODUCTION TO RI
- Define responsible investment
- Describe ESG issues
- Recognise how ESG issues are related to sustainability trends and themes
- Demonstrate how ESG issues create risks and opportunities for investors
- Identify a process for incorporating ESG analysis into investment decisions

### RI AND CORPORATE GOVERNANCE
- Describe corporate governance
- Understand why corporate governance is important to investors
- Understand the role of people, tools and processes that constitute corporate governance
- Recognise best practice in corporate governance
- Understand how to incorporate corporate governance issues into financial models and ratio work

### RI AND ACTIVE OWNERSHIP
- Identify the elements of and design an engagement policy
- Determine engagement priorities
- Recognise the different models for, and approaches to, engagement
- Develop an engagement plan
- Explain how the outcomes of engagement activities impact investment decisions

### 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
- Understand how to incorporate environmental issues into financial models and ratio work

### RI AND FINANCIAL ANALYSIS
- Understand how ESG information complements traditional financial analysis
- Identify different types of ESG information relevant to financial analysis
- Understand elements of ESG analysis, including the role of materiality
- Apply techniques for qualification and quantification of ESG factors
- Integrate ESG data into basic financial models

### IMPLEMENTING A RI PROGRAMME
- Develop a plan for implementing a responsible investment programme that meets the requirements of the PRI within your organisation
- Identify the people, processes and tools related to responsible investment
- Identify the areas and elements that could be considered when implementing responsible investment
- Identify the information you need for internal and external reporting on your responsible investment activities

### CASE STUDIES
- Environmental case study: BP
- Social case study: Facebook
- Governance case study: Volkswagen

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