Socially Responsible Investing and ESG Metrics Training Course

Professional Development Training Course Outline

Category	Environmental Management and Conservation	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In an increasingly **conscious capital** landscape, Socially Responsible Investing (SRI) and the integration of **Environmental, Social, and Governance (ESG)** metrics have moved from a niche consideration to a core component of mainstream financial strategy. Socially Responsible Investing and ESG Metrics Training Course provides a comprehensive framework for understanding how to **integrate ESG factors** into investment analysis, portfolio management, and corporate strategy. Participants will learn to navigate the complex web of **ESG data** and **sustainability reporting** standards to make informed, values-aligned, and financially sound decisions. We'll explore the dynamic interplay between **financial performance**, ethical considerations, and **long-term value creation**, equipping professionals with the practical skills to drive **sustainable finance** and **impact investing** initiatives within their organizations.

This program delves into the **materiality of ESG factors**, dissecting how they can affect a company's **risk-adjusted returns**, operational efficiency, and reputation. By bridging the gap between traditional **financial analysis** and **non-financial metrics**, the course empowers individuals to lead the charge in a new era of **responsible capitalism**. We will cover everything from **regulatory compliance** and **due diligence** to the nuances of **greenwashing** and **stakeholder engagement**. This training is designed to provide a holistic view of the **sustainable investment ecosystem**, ensuring you are prepared to meet the growing demands of investors, regulators, and the public.

Programme Curriculum

Socially Responsible Investing and ESG Metrics Training Course

Introduction

In an increasingly **conscious capital** landscape, Socially Responsible Investing (SRI) and the integration of **Environmental, Social, and Governance (ESG)** metrics have moved from a niche consideration to a core component of mainstream financial strategy. Socially Responsible Investing and ESG Metrics Training Course provides a comprehensive framework for understanding how to **integrate ESG factors** into investment analysis, portfolio management, and corporate strategy. Participants will learn to navigate the complex web of **ESG data** and **sustainability reporting** standards to make informed, values-aligned, and financially sound decisions. We'll explore the dynamic interplay between **financial performance**, ethical considerations, and **long-term value creation**, equipping professionals with the practical skills to drive **sustainable finance** and **impact investing** initiatives within their organizations.

This program delves into the **materiality of ESG factors**, dissecting how they can affect a company's **risk-adjusted returns**, operational efficiency, and reputation. By bridging the gap between traditional **financial analysis** and **non-financial metrics**, the course empowers individuals to lead the charge in a new era of **responsible capitalism**. We will cover everything from **regulatory compliance** and **due diligence** to the nuances of **greenwashing** and **stakeholder engagement**. This training is designed to provide a holistic view of the **sustainable investment ecosystem**, ensuring you are prepared to meet the growing demands of investors, regulators, and the public.

Course Duration

5 days

Course Objectives

Upon completion of this course, participants will be able to:

- Define and differentiate between Socially Responsible Investing (SRI), ESG, and impact investing.
- Analyze the financial materiality of ESG factors and their impact on corporate valuation and performance.
- Identify and apply key global ESG reporting frameworks and standards (e.g., GRI, SASB, TCFD).
- Perform ESG risk assessment and due diligence for investment and lending decisions.
- Integrate ESG data and analysis into traditional financial models and portfolio construction.
- Navigate the evolving landscape of sustainable finance regulations and disclosure requirements.
- Evaluate and benchmark a company's ESG performance using various ratings and metrics.
- Develop effective stakeholder engagement and communication strategies for ESG initiatives.
- Identify and mitigate the risks of greenwashing and reputational damage.
- Assess the social and environmental impact of investments beyond financial returns.
- Apply a fiduciary duty framework that incorporates both financial and non-financial risks and opportunities.
- Design and implement a corporate sustainability strategy aligned with UN Sustainable Development Goals (SDGs).
- Leverage technology and data analytics for robust ESG monitoring and reporting.

Organizational Benefits

- Demonstrates a commitment to ethical and sustainable practices, attracting socially conscious customers and investors.
- Proactively identifies and mitigates environmental, social, and governance risks that can impact financial stability and long-term viability.
- Appeals to a new generation of professionals seeking purpose-driven careers with **ESG-forward** organizations.

- Taps into the growing pool of **sustainable capital** and **green bonds**, often at more favorable terms.
- Research consistently shows a positive correlation between strong ESG practices and improved **risk-adjusted returns** and operational efficiency.
- Ensures alignment with emerging global **ESG regulations** and disclosure requirements, reducing legal and compliance costs.

Target Audience

- Investment Analysts & Portfolio Managers
- Corporate Finance & Strategy Officers
- Sustainability & ESG Professionals
- Risk & Compliance Officers
- Investor Relations Specialists
- Public Relations & Corporate Communications Managers
- Consultants & Advisors
- Business Development Professionals

Course Modules

Module 1: Foundations of Sustainable Investing & ESG

- Understanding the historical context and evolution of **Socially Responsible Investing**.
- Differentiating between ESG, SRI, **impact investing**, and ethical investing.
- The business case for ESG: From **fiduciary duty** to value creation.
- Key drivers of the **ESG movement**: regulations, investor demand, and societal pressure.
- **Case Study:** The rise of ESG in institutional asset management.

Module 2: Environmental (E) Metrics & Climate Risk

- Assessing **carbon footprint** and **GHG emissions**
- Evaluating a company's approach to **renewable energy**, resource management, and **circular economy** .
- Identifying and managing physical and transition **climate risks** (TCFD framework).
- **Biodiversity** and ecosystem considerations in investment decisions.
- **Case Study:** Analyzing the **climate strategy** and **decarbonization** efforts of a major energy company.

Module 3: Social (S) Metrics & Human Capital

- Measuring and reporting on **Diversity, Equity, and Inclusion (DEI)**.
- Assessing labor practices, human rights, and supply chain standards.
- Understanding and mitigating social risks: community relations and stakeholder impact.
- **Customer satisfaction** and product responsibility.
- **Case Study:** Examining a company's response to a **supply chain** labor crisis.

Module 4: Governance (G) Metrics & Corporate Ethics

- The role of the board of directors in overseeing ESG strategy.
- Analyzing **executive compensation**, ethical leadership, and anti-corruption policies.
- Shareholder rights and **investor engagement** on governance issues.
- Data privacy and cybersecurity as governance factors.
- **Case Study:** Evaluating the governance changes at a company following a major scandal.

Module 5: ESG Data, Ratings, & Analytics

- Sources of ESG data: Ratings agencies, third-party providers, and company disclosures.
- Interpreting and critically analyzing **ESG ratings** and scores.
- Challenges in data quality and comparability across sectors.
- Leveraging **AI and machine learning** for ESG analysis.
- **Case Study:** Comparing ESG ratings from different providers for a tech company and reconciling the differences.

Module 6: ESG Integration into the Investment Process

- Applying **negative screening**, positive screening, and **best-in-class** strategies.
- Integrating ESG factors into **financial modeling** and valuation.
- Building and managing an **ESG-integrated portfolio**.
- Active ownership: Proxy voting and shareholder activism.
- **Case Study:** Constructing an **ESG-focused portfolio** for a retail investor.

Module 7: ESG Reporting & Disclosure

- Mastering key reporting standards: GRI, SASB, and the new **ISSB**.
- Understanding mandatory and voluntary disclosure requirements.
- Creating a compelling and transparent **sustainability report**.
- The importance of **materiality assessments** in reporting.
- **Case Study:** Developing a sustainability report for a consumer goods company.

Module 8: The Future of Sustainable Finance

- Emerging trends: **Biodiversity finance**, blue economy, and **regenerative finance**.
- The rise of **sustainable bonds** and green credit markets.
- **Impact measurement** and demonstrating real-world outcomes.
- The role of **regulatory taxonomy** (e.g., EU Taxonomy) in shaping markets.
- **Case Study:** An overview of a successful **green bond** issuance and its impact.

Training Methodology

This course uses a blended learning approach to ensure maximum engagement and knowledge retention. The methodology includes:

- Interactive Lectures.
- Real-World Case Studies.
- Practical Exercises & Workshops.
- Group Discussions.
- Q&A Sessions.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com