Socially Responsible Investing Training Course

Professional Development Training Course Outline

Category	Capital Markets and Investment	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Socially Responsible Investing (SRI) Training Course provides participants with a comprehensive understanding of sustainable and ethical investment practices. This course emphasizes integrating environmental, social, and governance (ESG) criteria into investment decisions to maximize both financial returns and positive societal impact. Participants will gain actionable insights on responsible investment strategies, sustainable portfolio management, and risk mitigation through real-world case studies and interactive sessions. The course leverages trending investment concepts such as ESG integration, impact investing, ethical finance, and corporate social responsibility to equip professionals with advanced knowledge and practical skills for modern financial markets.

The SRI Training Course is designed to develop the competencies of finance professionals, portfolio managers, investment analysts, and corporate leaders to make informed and responsible investment choices. It combines practical tools, analytical frameworks, and ethical decision-making models, enabling participants to align financial performance with social and environmental stewardship. Through a mix of lectures, group discussions, and scenario-based learning, participants will enhance their understanding of ESG reporting, sustainability metrics, shareholder engagement, and the regulatory landscape governing socially responsible investments.

Programme Curriculum

Socially Responsible Investing Training Course

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Course Objectives

1. Understand the fundamentals of socially responsible investing and ESG principles.
2. Analyze corporate governance practices and their impact on investment decisions.
3. Evaluate environmental sustainability metrics for effective portfolio management.
4. Develop strategies for ethical and impact investing.
5. Integrate social responsibility factors into risk assessment and mitigation.
6. Apply ESG scoring methodologies to investment analysis.
7. Identify emerging trends in sustainable finance and ethical investment.
8. Design socially responsible investment portfolios aligned with stakeholder values.
9. Explore regulatory frameworks and global standards for ESG compliance.
10. Assess corporate social responsibility initiatives and their investment implications.
11. Enhance shareholder engagement through responsible voting and advocacy.
12. Measure financial performance alongside social and environmental impact.
13. Conduct case study analyses to implement SRI strategies in real-world scenarios.

Organizational Benefits

- Improved corporate reputation and investor trust
- Alignment with global sustainability standards
- Enhanced risk management and compliance adherence
- Increased long-term financial performance
- Strengthened stakeholder relations and engagement
- Access to ESG-focused investment opportunities
- Promotion of ethical corporate culture
- Better reporting and transparency on sustainability metrics
- Competitive advantage in socially conscious markets
- Contribution to positive societal and environmental outcomes

Target Audiences

1. Investment managers and portfolio analysts
2. Financial advisors and wealth managers

3. Corporate executives and decision-makers
4. ESG and sustainability consultants
5. Social impact fund managers
6. Regulatory and compliance officers
7. Risk management professionals
8. Students and professionals pursuing careers in sustainable finance

Course Duration: 5 days

Course Modules

Module 1: Introduction to Socially Responsible Investing

- Definition and evolution of SRI
- Principles of ESG integration
- Benefits and challenges of responsible investing
- Global trends in sustainable finance
- Key stakeholders in SRI
- Case Study: Analysis of a leading SRI portfolio

Module 2: Environmental Considerations in Investing

- ESG environmental criteria overview
- Carbon footprint and climate risk assessment
- Renewable energy investments
- Sustainable resource management
- Environmental reporting standards
- Case Study: Evaluating a company’s environmental performance

Module 3: Social Factors in Investment Decisions

- Social responsibility metrics and indicators
- Labor practices and human rights considerations
- Community impact analysis
- Diversity, equity, and inclusion strategies
- Stakeholder engagement in social initiatives
- Case Study: Social impact assessment of a multinational corporation

Module 4: Governance Practices and Ethical Investment

- Corporate governance frameworks
- Board composition and executive accountability
- Ethical decision-making in investment

- Regulatory compliance and reporting
- Shareholder rights and activism
- Case Study: Governance evaluation of a listed company

Module 5: ESG Integration and Portfolio Management

- ESG scoring methodologies
- Screening and selection strategies
- Portfolio diversification with ESG focus
- Risk-return analysis for sustainable portfolios
- Performance measurement tools
- Case Study: Designing a high-impact ESG portfolio

Module 6: Impact Investing Strategies

- Defining and measuring social impact
- Investment in social enterprises
- Metrics for financial and societal outcomes
- Long-term sustainability considerations
- Alignment with UN Sustainable Development Goals
- Case Study: Investment in a global impact fund

Module 7: Regulatory Frameworks and Global Standards

- International ESG reporting standards
- Compliance requirements for investors
- Global best practices in responsible investment
- Ethical considerations in cross-border investments
- Reporting and transparency frameworks
- Case Study: Regulatory compliance in ESG investments

Module 8: Practical Implementation of SRI

- Developing responsible investment policies
- Stakeholder engagement and communication
- Monitoring and evaluating ESG performance
- Integrating ESG into financial decision-making
- Overcoming implementation challenges
- Case Study: Real-world SRI implementation in a financial institution

Training Methodology

- Interactive lectures and expert presentations
- Case study analysis and group discussions
- Scenario-based learning and role-playing exercises
- Hands-on portfolio development exercises
- ESG scoring and data analytics workshops
- Continuous feedback and evaluation 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

Start Date	End Date	Location	Price
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:

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