

## CERTIFICATE IN ESG INVESTING 2023

### *Unit Aims*

**By the end of this unit, learners should be able to demonstrate:**

- ▶ An understanding of the context for different approaches to responsible investment and specifically, consideration of environmental, social and governance (ESG) factors.
- ▶ An understanding of the underlying issues that constitute factors within each of the environmental, social and governance areas.
- ▶ An understanding of the broader sustainability context and global initiatives.
- ▶ An understanding of the ESG market: relevance, size, scope, key drivers and challenges, and risks and opportunities.
- ▶ An understanding of environmental factors, systemic relationships, material impacts, megatrends and approaches to environmental analysis at country, sector and company levels.
- ▶ An understanding of social factors, systemic relationships, material impacts and approaches to social analysis at country, sector and company levels.
- ▶ An understanding of governance factors, key characteristics, main models and material impacts.
- ▶ An understanding of engagement and stewardship.
- ▶ An understanding of ESG analysis, valuation and integration.
- ▶ An ability to analyse how ESG factors may affect industry and company performance, and security valuation across a range of asset classes.
- ▶ An understanding of ESG integrated portfolio construction and management.
- ▶ An ability to apply a range of approaches to ESG analysis and integration across a range of asset classes.
- ▶ An understanding of investment mandates, portfolio analytics and client reporting.