



TRAINING SPRINTS

SUSTAINABLE INVESTING

NET ZERO ROADMAP INVESTMENT DESIGN PRINCIPLES

LECTURER	Markus Schuller
LENGTH	1.5h
LEARNING GOAL	Participants will learn about investment design principles to optimize their net zero roadmap
PS FRAMEWORK	Behaviour / Individual
CPD ACCREDITED	Yes (1.5 credits)
LANGUAGE	English
BENEFICIAL FOR	CIOs, Asset Allocators, Analysts, PMs, Strategists, Board of directors, Sustainability & Stewardship Officers etc.
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom)
COSTS	EUR 149 per participant
MINIMUM SIZE	5 participants

September 14th, 2023 /3 p.m. – 4,30 p.m./

DESCRIPTION

The energy transition to a low-carbon economy will require the development of a wide range of new financial instruments and innovations, with profound implications for markets, companies, intermediaries and investors.

A pre-requisite: the seamless integration of profit and impact motive into the investment process. The question remains, how to do that. Participants will learn about investment design principles to achieve this seamless integration onto their own net zero roadmap.

PROGRAM

PART ONE

BEST PRACTICES (45min)

- Introduction to Net Zero Portfolio Management (NZPM)
 - SDG Selection
 - Value Creation Focus
 - Causal Impact Assessment
 - Investment Process Adaptability
 - Investment Professional Adaptability
- NZPM Investment Design Principles

PART TWO

DELIBERATE PRACTICE (30min)

Participants will practice how to work in the design principles into their own area of responsibility.

LESSONS LEARNED (5min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

