

SEMINAR
**Sustainable
Finance & Investing**

Navigating the evolving
landscape of ESG



Short description

As sustainable finance becomes mainstream, there is a growing need for professionals to build specialized expertise.

The seminar explores the ESG financial ecosystem, the evolving policies and regulations, and ESG reporting standards, as well as the drivers and dynamics of the sustainable finance market.

The seminar expands on how institutional investors evaluate real-economy companies in their ESG preparedness and how they incorporate ESG considerations in their investment analysis and valuation to inform their investment decisions and stewardship activities.

Target Audience

- CFOs and Investor Relations Officers
- ESG Officers
- Investment professionals
- Banking and Finance professionals
- Financial advisors and consultants
- Executives of listed companies and members of the Stock Exchange
- Individuals working in or aspiring to pursue a career in this sector

Purpose

The seminar intends to provide participants with a solid understanding of the fundamentals of sustainable finance, the different investing strategies and instruments used in sustainable finance, and how investment practitioners evaluate ESG factors as part of their investment decisions and engagement and voting activities.

In partnership with



13 & 20 February 2025



17:00 - 21:00
Duration: 8 hours



Athens Exchange Group



Vicky Delieza, CFA
Financial Advisor



200€ + VAT (24%)

Fees are deposited in Alpha Bank, account no. 101-00-2002-046556 or IBAN GR65 0140 1010 1010 0200 2046 556.



Application Deadline
10 February 2025

[Registration Link](#)

Methodology

- Course Presentation
- Case studies and videos



Objectives

- Explore the evolving sustainable investing landscape, including global initiatives, international ESG reporting standards and frameworks, policies, and regulations.
- Comprehend the main elements of the EU Regulatory Framework on Sustainable Finance and key concepts in sustainable finance, such as corporate sustainability, double materiality, stakeholder capitalism, and ESG stewardship. Consider the growing role of active ownership in sustainable investing and how it is implemented in practice.
- Look at the underlying investor motivations, size, and trends of the sustainable finance market, and understand sustainable investing approaches for different funds and bonds.
- Discover the different investment strategies employed in sustainable investing and learn how institutional investors assess the materiality of each of the individual pillars of ESG in terms of the methodologies, tools, and standards used by practitioners and how ESG factors are incorporated in investment analysis, decision-making, and active ownership.
- Understand the role of ESG ratings in sustainable investing, the construction of ESG indices, and the inherent limitations that have prompted the EU ESG Rating Regulation.

Instructor

Vicky Delieza, CFA
Financial Advisor

Ms. Delieza holds broad experience as a financial advisor and investment professional across origination, deal execution, and investment monitoring, having undertaken diverse roles and assignments in corporate and investment banking, private equity, asset management, and strategy consulting.

She is an independent investments and strategy advisor and has been working as a financial expert on investments in innovative low-carbon technologies.

Ms. Delieza holds a degree in Chemical Engineering from the National Technical University of Athens and an MBA from the University of Warwick, UK. In addition to earned degrees, she is a CFA charter holder and a CFA Instructor on Alternative Investments. She also holds the CFA Institute's CIPM Certificate and the Certificate in ESG Investing.

Course Plan

Day 1

- Key Sustainable Finance and Investing Initiatives
- Sustainability Megatrends and ESG as a driver of long-term value creation
- The UN's SDGs as a blueprint for sustainable finance and the paradigm shift to stakeholder capitalism
- From financial materiality to double materiality
- The ESG financial ecosystem, the evolution of sustainability reporting, and the ISSB Standards
- Sustainable Investment Policies and Regulations – the EU Legislative Framework on Sustainable Finance
- Corporate Sustainability
- Motivations for the Integration of ESG Considerations
- The Sustainable Finance Market - Sustainable Investing Approaches and Sustainable Bonds

Day 2

- Sustainable investments, investment strategies to ESG Integration
- ESG integration framework: analysis, valuation, asset allocation
- Integration of ESG factors in investment analysis and valuation: materiality assessment (SASB Materiality Maps, AI in ESG risk assessment, ESG ratings), tools and methodologies used in investment analysis, valuation approach
- The E factor in ESG Investing – Assessment of Environmental Factors, Case Study
 - Assessment of Climate Change (the TCFD Framework, the GHG Protocol, carbon pricing and carbon markets, the NGFS climate scenarios)
 - Assessment of Nature Change-Biodiversity Loss (the Natural Capital Protocol framework, the TNFD Framework, the Science Based Targets for Nature materiality matrix)
- The S factor in ESG Investing - Assessment of Social Factors, Case Study
- The G factor in ESG Investing: Assessment of Governance Factors, Case Study
- ESG Ratings and ESG Indexes, the EU ESG Rating Regulation, the EU Climate Transition Benchmarks, incorporation of ESG factors in Corporate Credit Ratings