ESG in Equity 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

Environmental, Social, and Governance (ESG) investing has become a pivotal strategy for modern equity investors aiming to align profitability with sustainability. The global shift towards responsible investment practices underscores the importance of integrating ESG criteria into equity analysis, portfolio management, and risk assessment. ESG in Equity Investing Training Course is designed to provide finance professionals, portfolio managers, analysts, and investors with comprehensive insights into ESG frameworks, regulatory developments, and market trends. Participants will gain practical skills to identify ESG risks, evaluate sustainable investment opportunities, and leverage ESG metrics to enhance long-term financial performance.

In addition, this course explores how ESG integration impacts corporate valuation, shareholder engagement, and investment decision-making. Learners will examine real-world case studies, explore trending ESG technologies, and develop the ability to construct ESG-compliant equity portfolios. By the end of this program, participants will possess the knowledge and analytical capabilities to drive responsible investment strategies that meet evolving stakeholder expectations. This course also emphasizes actionable tools for measuring ESG impact and achieving sustainable financial outcomes.

Programme Curriculum

ESG in Equity Investing Training Course

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Course Objectives

1. Understand core ESG principles and their relevance in equity investing.
2. Identify key ESG metrics and data sources for corporate evaluation.
3. Analyze ESG risks and opportunities in global equity markets.
4. Apply ESG frameworks in portfolio construction and optimization.
5. Evaluate ESG performance of companies using trending analytics tools.
6. Integrate climate change considerations into equity investment decisions.
7. Understand regulatory and reporting standards for ESG compliance.
8. Develop strategies for shareholder engagement on ESG matters.
9. Utilize sustainable finance instruments to enhance portfolio returns.
10. Explore ESG-focused investment trends and emerging market opportunities.
11. Conduct ESG scoring and benchmarking for comparative analysis.
12. Implement technology-driven solutions for ESG data management.
13. Apply case-based learning to real-world ESG investment scenarios.

Organizational Benefits

- Improved ESG risk management and compliance.
- Enhanced long-term portfolio performance with sustainable returns.
- Strengthened corporate reputation and investor trust.
- Alignment with global sustainable investment standards.
- Increased capacity for ESG-integrated decision-making.
- Better stakeholder engagement and transparency.
- Access to ESG analytics and reporting tools.
- Knowledge of emerging ESG trends and market opportunities.

- Support in meeting sustainability and regulatory goals.
- Competitive advantage in responsible investment strategies.

Target Audiences

1. Portfolio managers and investment analysts.
2. Asset management professionals.
3. Financial advisors and consultants.
4. Institutional investors and fund managers.
5. Corporate finance executives.
6. Sustainability officers and ESG specialists.
7. Risk management and compliance professionals.
8. Students and professionals pursuing ESG certifications.

Course Duration: 5 days

Course Modules

Module 1: Introduction to ESG Investing

- Overview of ESG principles and market relevance
- Historical evolution of ESG in equity markets
- Global trends in sustainable investing
- Key ESG regulatory frameworks
- ESG performance metrics and ratings
- Case study: ESG integration in leading multinational corporations

Module 2: Environmental Factors in Equity Investing

- Climate change and carbon footprint assessment
- Renewable energy and green investments
- Environmental risk analysis in equity portfolios
- ESG reporting standards for environmental factors
- Impact of environmental policies on market valuation
- Case study: Evaluating a green energy company for portfolio inclusion

Module 3: Social Factors in Equity Investing

- Labor practices and human rights compliance

- Community engagement and corporate social responsibility
- Diversity, equity, and inclusion metrics
- Stakeholder impact assessment
- Social risk management in equity selection
- Case study: Assessing a multinational company’s social governance practices

Module 4: Governance Factors in Equity Investing

- Board structure and executive compensation
- Corporate ethics and transparency
- Anti-corruption and compliance policies
- Shareholder rights and engagement strategies
- ESG-related corporate governance benchmarks
- Case study: Evaluating governance quality in a Fortune 500 company

Module 5: ESG Integration Techniques

- Screening strategies (positive and negative screening)
- ESG scoring and weighting methodologies
- Portfolio construction incorporating ESG criteria
- Factor-based ESG investing
- Multi-criteria ESG decision models
- Case study: Constructing a sustainable equity portfolio

Module 6: ESG Reporting and Regulatory Compliance

- Global ESG reporting standards (GRI, SASB, TCFD)
- Regulatory trends and disclosure requirements
- ESG audit and assurance processes
- Compliance monitoring and risk mitigation
- Reporting tools and dashboards
- Case study: Regulatory compliance analysis of an equity fund

Module 7: ESG Analytics and Data Tools

- Data sources for ESG analysis
- Technology-driven ESG scoring platforms

- Quantitative models for ESG evaluation
- Predictive analytics for ESG risk
- ESG benchmarking and visualization tools
- Case study: Using analytics software for ESG performance assessment

Module 8: Case-Based ESG Equity Strategies

- ESG portfolio performance evaluation
- Integration of ESG in active vs. passive strategies
- Risk-adjusted return analysis
- Impact investing and shareholder engagement
- Scenario planning for ESG investment decisions
- Case study: Implementing an ESG-focused investment strategy in emerging markets

Training Methodology

- Interactive lectures with ESG frameworks and concepts
- Practical exercises and hands-on portfolio simulations
- Analysis of real-world ESG case studies
- Group discussions and peer-to-peer knowledge sharing
- Use of ESG analytics tools for decision-making
- Scenario-based problem solving for investment challenges

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

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Register Online Now

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