ESG Portfolio Construction Training Course

Professional Development Training Course Outline

Category	Capital Markets and Investment	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

ESG Portfolio Construction Training Course is designed to equip finance professionals, portfolio managers, and investment analysts with advanced knowledge and practical skills in integrating Environmental, Social, and Governance (ESG) factors into investment strategies. This course emphasizes sustainable investing, risk management, and ethical finance practices to help organizations meet regulatory requirements, improve stakeholder trust, and enhance long-term portfolio performance. Participants will gain insights into ESG metrics, data analytics, and portfolio optimization techniques, ensuring that they can effectively align investment objectives with sustainability goals.

As global markets increasingly prioritize sustainability, this course highlights the importance of ESG integration in portfolio construction and asset management. Attendees will learn cutting-edge strategies to evaluate ESG risks, identify green investment opportunities, and measure the impact of ESG decisions on financial performance. Through a combination of case studies, hands-on exercises, and expert-led discussions, participants will develop the ability to implement ESG principles in real-world investment scenarios. By the end of the training, professionals will be empowered to drive organizational sustainability initiatives while maximizing risk-adjusted returns.

Programme Curriculum

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Course Objectives

1. Understand ESG investment principles and sustainable finance frameworks.
2. Identify key ESG factors and metrics for portfolio evaluation.
3. Apply ESG data analytics and screening techniques in investment decisions.
4. Construct diversified portfolios incorporating ESG considerations.
5. Evaluate ESG risk management strategies and impact measurement.
6. Integrate ESG ratings and third-party ESG data into portfolio analysis.
7. Align investment strategies with global sustainability standards.
8. Enhance ethical investment decision-making processes.
9. Implement ESG reporting and disclosure requirements effectively.
10. Optimize asset allocation with ESG-focused strategies.
11. Analyze real-world ESG portfolio case studies for practical insights.
12. Leverage advanced tools for ESG performance tracking.
13. Improve stakeholder engagement through sustainable investment practices.

Organizational Benefits

- Strengthen sustainable investment strategies.
- Improve corporate social responsibility performance.
- Enhance portfolio risk-adjusted returns.
- Comply with ESG regulatory requirements.
- Increase investor and stakeholder confidence.
- Promote ethical decision-making in finance.
- Drive innovation in sustainable asset allocation.

- Improve transparency in ESG reporting.
- Reduce exposure to ESG-related risks.
- Foster a culture of long-term sustainable growth.

Target Audiences

1. Portfolio Managers
2. Investment Analysts
3. Asset Management Professionals
4. Risk Managers
5. ESG Analysts
6. Financial Advisors
7. Compliance Officers
8. Corporate Finance Professionals

Course Duration: 10 days

Course Modules

Module 1: Introduction to ESG Investing

- Overview of ESG principles
- History and evolution of ESG investing
- Global ESG regulatory frameworks
- Benefits of ESG integration
- ESG investment trends and statistics
- Case Study: ESG adoption by leading global asset managers

Module 2: ESG Data and Metrics

- Key ESG indicators and data sources
- ESG scoring methodologies
- Materiality assessment in ESG
- Data quality and validation
- Integrating ESG data into investment models
- Case Study: ESG metrics impact on portfolio performance

Module 3: ESG Risk Management

- ESG risk identification and assessment
- Climate risk and carbon footprint analysis
- Social and governance risk evaluation
- ESG risk mitigation strategies
- Scenario analysis and stress testing
- Case Study: Managing ESG risks in multinational portfolios

Module 4: ESG Portfolio Construction

- ESG-focused asset allocation
- Diversification strategies with ESG factors
- Investment horizon and ESG objectives alignment
- Factor-based ESG investing
- Portfolio optimization techniques
- Case Study: Constructing an ESG balanced fund

Module 5: Sustainable Investment Strategies

- Thematic ESG investing
- Impact investing principles
- Green bonds and sustainable fixed income
- ESG integration in equity portfolios
- Active vs passive ESG strategies
- Case Study: ESG thematic equity fund performance

Module 6: ESG Reporting and Disclosure

- ESG reporting standards (GRI, SASB, TCFD)
- Transparency and stakeholder communication
- ESG performance indicators
- Reporting frameworks and compliance
- Best practices in ESG disclosure
- Case Study: Corporate ESG disclosure analysis

Module 7: ESG Screening and Selection Techniques

- Positive and negative screening

- Best-in-class and exclusionary approaches
- ESG scoring for investment selection
- Portfolio screening with ESG constraints
- Incorporating ESG ratings from third-party providers
- Case Study: ESG screening for global equity portfolios

Module 8: ESG Integration in Fixed Income

- ESG factors in bond selection
- Green bonds and social bonds
- ESG credit rating considerations
- ESG risk-adjusted yield analysis
- Portfolio impact of ESG fixed income strategies
- Case Study: ESG bond fund performance evaluation

Module 9: ESG Factor Analysis

- Environmental, Social, and Governance factor modeling
- Correlation analysis with financial performance
- Quantitative ESG factor integration
- Factor-based portfolio construction techniques
- Risk-return optimization using ESG factors
- Case Study: ESG factor impact on multi-asset portfolios

Module 10: ESG Performance Measurement

- Key performance indicators for ESG portfolios
- Benchmarking ESG portfolios
- Monitoring and evaluating ESG outcomes
- Reporting ESG performance to stakeholders
- Advanced ESG analytics tools
- Case Study: Measuring ESG impact on fund performance

Module 11: ESG Regulatory Compliance

- Understanding global ESG regulations
- Regulatory reporting requirements

- Compliance monitoring techniques
- ESG governance and oversight
- ESG-related legal risk management
- Case Study: ESG compliance implementation in a multinational firm

Module 12: Advanced ESG Investment Tools

- ESG analytics software and platforms
- Portfolio management systems with ESG integration
- ESG risk assessment tools
- Reporting dashboards for ESG performance
- Data visualization techniques for ESG metrics
- Case Study: Using ESG tools for real-time portfolio monitoring

Module 13: Stakeholder Engagement and Communication

- Engaging investors on ESG initiatives
- Communicating ESG strategy and results
- Integrating ESG considerations in client presentations
- Building trust with stakeholders
- Effective ESG storytelling
- Case Study: Successful stakeholder engagement campaigns

Module 14: ESG Case Studies in Portfolio Construction

- Real-world ESG portfolio examples
- Lessons learned from ESG implementation
- Evaluating successes and challenges
- Adapting ESG strategies across sectors
- Benchmarking ESG best practices
- Case Study: Global ESG portfolio performance analysis

Module 15: Capstone ESG Portfolio Project

- Practical ESG portfolio construction exercise
- Team-based portfolio optimization
- ESG risk and return evaluation

- Application of ESG screening and reporting techniques
- Presentation of ESG portfolio strategy
- Case Study: Capstone portfolio performance review

Training Methodology

- Interactive lectures with ESG experts
- Hands-on portfolio simulation exercises
- Case studies analysis from global ESG portfolios
- Group discussions and strategy workshops
- ESG data analytics demonstrations
- Real-time portfolio construction projects

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	04 Dec 2026	Online	$2,000

Start Date	End Date	Location	Price
23 Nov 2026	04 Dec 2026	Physical	$3,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$9,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$12,000

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