

Theme

The field of «sustainable investing» has been growing extensively over the last years. Asset managers and asset owners, both individual and institutional investors, show more and more interest and start to consider ecological, social and governance (ESG) criteria when making investment decisions. Investment professionals and academic research acknowledges that such extra-financial criteria can have a significant impact on long-term risk and return profiles of investment portfolios. Accordingly, sustainable investment strategies combine seeking financial investment performance with making a positive contribution to society and the environment. This is often referred to as «double bottom line» or «triple bottom line» investment returns.

According to the most recent market study by SSF (Swiss Sustainable Finance), the market for sustainable investments (funds, mandates and asset owners) grew considerably in 2017, reaching a level of CHF 391 billion in Switzerland. Yet, while the share of sustainable investments overall is growing at fast pace and the topic is gaining increasing attention, there is a large variety in definitions and terminologies. Different financial market players use different concepts and have a choice between a broad range of strategies, not all of them leading to comparable returns at the double or triple bottom line. For any financial market professional interested in keeping up with important financial market developments, it is therefore important to learn about the large spectrum behind the concept of sustainable investing.

Contact

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www.csp.uzh.ch/en/cas-sustainable-finance-en.html



University of
Zurich ^{UZH}

Continuing Education

**Sustainable
Investing (SI)**

**Executive Education Course
Department of Banking and Finance
University of Zurich**

Overview

Course objectives

Completing the executive course on Sustainable Investing allows participants to distinguish the different concepts and definitions of sustainability and „sustainable investments“ used in financial markets. They gain an in-depth understanding on the international sustainable investment markets; they learn to identify different investor profiles and to assess and accompany their investment decisions accordingly. This includes major assessment tools and key performance indicators used for risk analysis and performance measurement as well as in-depth insights into the practice of sustainability reporting and rating that are needed to make informed investment decisions.

Participants develop systematic knowledge of the different sustainable investment strategies and understand key elements and specialties of asset management techniques incorporating sustainability aspects for both listed investments as well as selected thematic investments. Finally, the course strengthens participants' consulting and decision competencies for different investor profiles.

Course participants

This course is designed for practitioners in the financial sector who want to understand the economic, social, and environmental dimensions of sustainability and their implications for investment decisions and asset management approaches.

Number of participants

Minimum 12, maximum 25 participants

Methods

Presentations of conceptual frameworks with practical exercises and applications, complemented by discussions and exchange of experiences, group work exercises, and case studies. Course content is presented by renowned practitioners and specialists from academia.

Language

The courses will be taught in English.

Lecturers and expert speakers

- Matthias Bönning, oekom research AG
- Stephan Hirschi, PwC
- Christoph Jochum MSc, CSSP AG
- Pierin Menzli, Bank J. Safra Sarasin AG
- Dr. Julia Meyer, IBF UZH
- Dr. Falko Paetzold, IBF UZH
- Prof. Dr. Georg von Schnurbein, CEPS, University of Basel
- Prof. Dr. Sebastian Utz, University of St. Gallen

Course content

- Concepts of sustainability, their origins and evolution, and their use in investments
- Volume and trends in international sustainable investment markets
- Sustainable investment strategies and their characteristics
- ESG reporting and rating standards with regard to sustainable investment products and portfolios
- Traditional asset management techniques and the use of sustainability criteria to select optimum portfolios
- Key differences between standard (listed) and non-listed sustainable investment strategies and their investment channels and underlying
- Assessment of different investor types, their investment profiles, and strategies with regards to sustainable investments
- Characteristics and specialties of family offices and (U)HNWIs with regards to sustainable and impact investing
- Discussion of specific characteristics and strategies of foundations as sustainable investors

Degree

Course certificate or 3 ECTS Credits. The credits can be transferred to the CAS in Sustainable Finance or the DAS/MAS in Finance – assessment based.

Date/Time

Wednesday, November 21st, 2018, 9.00 – 18.00 and
Thursday, November 22nd, 2018, 9.00 – 18.00

Venue

Zentrum für Weiterbildung der Universität Zürich (Center for Continuing Education UZH), Schaffhauserstrasse 228, 8057 Zürich (www.zwb.uzh.ch)

Cost

CHF 1500.– tuition

Tuition covers all materials and breaks. Travel and accommodation are not included.

Registration

Registration deadline is November 11, 2018

Register online at www.finance-weiterbildung.uzh.ch

After you complete the registration form, you will receive a confirmation and tuition invoice. Written cancellation with tuition reimbursement is possible until registration deadline, after which tuition will not be reimbursed.

Governance and Executive Course Programme Directors

Dr. Julia Meyer

Prof. Dr. Marc Chesney

Center for Sustainable Finance and Private Wealth

Department of Banking and Finance

University of Zurich

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