

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.

The topic is evolving fast and terminologies and terms change over time. It is important that financial market professionals and investors keep track of ongoing developments and expected trends. Sustainable investing combines a large set of investment strategies, including very specialized approaches and fields such as active ownership, impact investing, passive investment strategies, and green bonds, among others. All investment strategies encompass specific types of considerations and have their own set of possible practical implications. To ensure professionalism of asset management in sustainable investing, credit rating techniques and indexes need to consider ESG factors and actively integrate such characteristics into their modelling and calculation techniques. This course tackles such special topics that are rapidly gaining importance within sustainable investing.

Collaboration, Contact

Collaboration

This course is organized in collaboration with WWF Switzerland.

www.wwf.ch/sustainablefinance



Contact

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



University of
Zurich ^{UZH}

Continuing Education

Current Trends in Sustainable Investing (SI)

Executive Education Course
Department of Banking and Finance
University of Zurich

Overview

Course objectives

Participants become familiar with current trends in sustainable investing and learn about adjustments of terminologies and concepts in this fast-moving field. They know how the market has evolved over the last years in Switzerland as well as internationally. They learn how active ownership strategies in the context of sustainable investing work, and how to assess and measure their success. The course gives detailed insights on the definition and particular characteristics of impact investment strategies. Furthermore, in-depth learning on how ESG considerations can be integrated into passive investment strategies and in the asset class of bonds in the form of green bonds, will be provided.

Course participants

This course is designed for practitioners in the financial sector who want to learn about current developments and special topics in sustainable investments. A basic knowledge about the economic, social, and environmental dimensions of sustainability and their implications for investment decisions (basic SI course) is required to attend the course.

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 course will be taught in English.

Lecturers and expert speakers

- Sabine Döbeli, Swiss Sustainable Finance
- Vincent Kaufmann, Ethos
- Dr. Annette Krauss, IBF UZH
- Martina Macpherson, S&P Dow Jones Indices
- Dr. Julia Meyer, IBF UZH

Course content

- Volume and trends in Swiss and international SI markets with a focus on investments for development
- Active ownership strategies in the context of SI strategies, approaches to measure them, and success factors of engagement strategies
- Specifics about impact investment strategies
- Know definitions, market participants, and current trends in green bonds
- Credit rating and indexing techniques with consideration of sustainability aspects

Degree

Course certificate or 1 ECTS Credit. The credits can be transferred to the CAS in Sustainable Finance or the DAS/MAS in Finance – assessment based.

Date/Time

Friday, November 23rd, 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 800.– tuition

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

Participants should bring their own laptops.

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

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Prof. Dr. Marc Chesney

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