



Overview

The program helps to develop a better understanding of the needs of capital markets in terms of ESG information and provides the candidates with the tools to embrace holistically ESG integration.

Global social and environmental challenges, regulatory and reputational risks, market scandals and new market opportunities make environmental, social and governance information (ESG) a data source of growing importance and integration of ESG information in the investment process chain and in valuation essential.

So far, only a few approaches and even fewer solutions exist that support investment professionals with the integration of ESG.

The CESGA training program provides the necessary training for the efficient Valuation, Measurement and Integration of ESG issues into investment analysis.

Target audience

The program is aimed at financial analysts, asset managers, corporate consultants, financial planners, family offices as well as other specialists such as corporate sustainability officers, investor relations, auditors and consultants wishing to embrace ESG integration holistically.

Program objectives

The program provides the necessary know how and understanding on:

- ESG impacts on risk and return from various angles
- Systematization of ESG investment approaches and strategies
- Market drivers for further ESG integration
- Systematically assess different ESG Reporting standards
- Responsible Investing across asset classes
- Integration of ESG factors in valuation models
- Embedding ESG across the whole investment process chain

Program structure

Recent Developments in ESG Integration

Introduction into the current state of sustainability integration within the financial sector. Discussion of the drivers of the demand for ESG, challenges associated with ESG integration, existing barriers, and an overview of empirical studies on ESG investment and implications for sustainable investment.

Regulatory Environment

Current state of sustainability regulations in the European Union and international trends. Description of the relevant regulations for corporations and investors, current international trends and future developments.

ESG-Strategies

Overview of the current sustainable investment landscape, definitions and relevant terms regarding sustainable investment as well as a variety of strategies and their distinctive features.

Responsible Investing across asset classes

Investment assets and the ESG-considerations by asset class. The module reviews how ESG-strategies can be developed according to different asset classes.

ESG Reporting (with a more European orientation)

Reporting requirements and key reporting frameworks and the ongoing trend toward convergence. Main sources of ESG information, ESG raw data issues, indicators and the dimensions of double materiality.

ESG Integration in Research

Integrate ESG information into investment decisions. Identify ESG value drivers based on global megatrends, qualitative analysis of corporate governance, analysis of sector-specific environmental and social issues on a qualitative basis, assess consistency with the business model.

ESG Integration in Valuation

Integrate qualitative analysis of material challenges into valuation models for equities, fixed income, and other asset classes.

Investment decision process

Investment decision in the context of the investment process chain: General steps of the process chain and the challenge of integrating ESG into the investment process

Case study - ESG integration in the investment decision

This practical module integrates the knowledge acquired in the previous modules in a framework to do a due diligence, taking ESG into account. The module includes examples on research and portfolio management.

ESG Regional Developments: ESG in Asia Pacific – where we stand (not subject to the exam)

This complementary module includes a summary on the regulatory framework in Asia, discussing the new developments in Japan, China, Hong Kong and Singapore and other Asia Pacific markets.

Format

The CESGA© online program covers the complete examination syllabus and contains the following supporting materials:

- E-seminars
- Course slides
- Sources / readings

The section "EVALUATION" provides a self-assessment with a limited number of multiple-choice questions module (except for case study), for exam preparation.

IMPORTANT: no tutorial services are included in the program.

Start and duration

Start any time. The time necessary to complete the program is 70-100 hours.

Examination

Format: One online exam with multiple-choice questions and a case study

Dates: March, June, September, December

Language

English (study material and exam)

Costs

Training program CHF 1'800* (access study platform: 1 year)
Examination CHF 250

* Access to study platform: until graduation, but max. 12 months, extension for 6 months can be acquired for CHF 400

For more information and any further questions

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