

FUNDAMENTALS OF
**SUSTAINABLE
INVESTING**

for Asset Management
Professionals



March 26, 2020
Kungsgatan 8
Stockholm, Sweden



NORDSIP
NORDIC SUSTAINABLE INVESTMENTS

WHY?

Asset management and sustainable investment practices are now forever intertwined



Clients demand more sustainable products



As the climate crisis worsens, **regulatory demands** increase

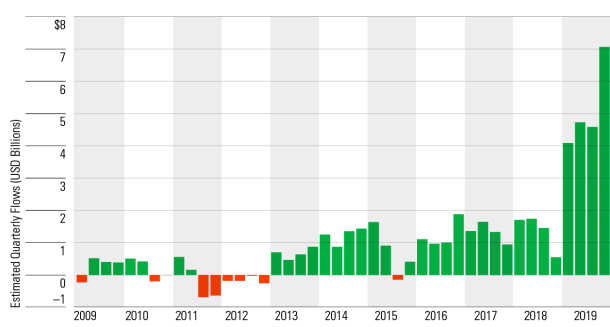


The Economic models are changing to include **extra-financial factors**



Focus shifts from avoiding risks to **finding opportunities**

Sustainable Funds Estimated Quarterly Flows



Source: Morningstar Direct. Data as of 12/31/2019.

AGENDA

THURSDAY, MARCH 26

- 13:30 Registration
- 13:45 Introduction
- 14:00 Sustainable Finance: an Overview
- 14:50 Break
- 15:05 Linking Sustainability & Value Drivers: Interactive Company Analysis
- 15:55 Break
- 16:10 The Landscape of Sustainable Asset Management
- 16:40 Wrap up and Main Take-Aways For Your Own Organisation
- 17:00 End



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WHAT?

During this intensive introductory course, the participants will:

- » Understand the evolution of sustainable finance, ESG and responsible investing
- » Discover the main standards and organisations driving the development of sustainable investment
- » Distinguish the different parts of the sustainable investment spectrum, from norm-based to impact investing
- » Understand how sustainability drives value for companies and what it means for investors
- » Identify the investment products that are relevant for your clients or for your institution

HOW?

4 EXPERTS

A blend between academic and hands-on asset management experience

3 HOURS

An introductory class with a condensed program for an efficient use of time

2 CASES

Explanations based on real-life situations provide a deeper learning experience

1 PROGRAM

Tailor-made to an audience of practitioners with concrete applicable take-aways

FOR WHOM?

This course is designed for practitioners working in the asset management industry who want to catch up with the fast-paced change in the field of sustainable investing.

It is suitable for investment professionals, senior management, board directors, as well as anyone working in sales & distribution, wealth management, product development, financial advice, consulting, risk and anyone looking to improve their understanding of ESG issues. The skills learned will be equally applicable to all asset classes.

Participants are not required to have any prior knowledge of ESG, SRI or CSR, but they should have a solid understanding of investment principles and about asset management in general.

WHO?



DR. WILLEM SCHRAMADE

Willem finds it important that financial professionals have the tools to integrate sustainability in financial analysis. This is what he wants to achieve with his Sustainable Finance Factory. He previously built the Global Equity Impact Opportunities fund at NN Investment Partners. In 2019 his book, 'Principles of Sustainable Finance', written with prof. Dr. Dirk Schoenmaker, was published by Oxford University Press. Dr Schramade obtained his PhD from RSM Erasmus University where he still teaches Sustainable Finance courses.



NADINE VIEL LAMARE

Nadine is Founder and Co-owner of Good4Business NVL AB and Director at the Transition Pathways Initiative (TPI). Prior to joining TPI she was Head of Sustainable Value Creation at Första AP-fonden (AP1), where she had been since 1992 in different roles such from performance analyst through Head of Corporate Communication and finally Head of Sustainable Value Creation in 2009, a role she held until November 2018. Nadine holds an MBA from the Stockholm School of Economics, she is a Certified European Financial Analyst (CEFA), and has completed a Harvard Business School executive education program in Corporate Social Responsibility (CSR).



KIM HANSSON

Kim supports the rapid expansion of sustainable investment practices by working with strategic relations at NordSIP. She has an extensive background in the asset management industry, working as department head of investment management and strategy organisations, as portfolio manager of mutual funds, a long/short equity fund, and as buy side as well as sell side financial analyst. She has also worked as an auditor and with business development at an academic financial centre. Kim is a certified European financial analyst and holds a degree in international business from the University of Lund.



ALINE REICHENBERG GUSTAFSSON, CFA (HOST)

Aline founded NordSIP in 2017 to bring insights about sustainable investment practices to professional investors in the Nordics. She has 20 years of experience in the asset management industry in Stockholm, London and Geneva, including as a long/short equity hedge fund portfolio manager, and buy-side analyst, but also as CFO and COO in several asset management firms. Aline holds an MBA from Harvard Business School and a License in Economic Sciences from the University of Geneva and the CFA.

PRACTICAL INFORMATION

Cost per person: SEK 5,000 (+VAT)

For groups of 3 participants or more: SEK 3,500 (+VAT)

Includes: all course materials, as well as coffee, tea, refreshments, pastries and fruits

Date: March 26, 2020

Location: Kungsgatan 8, Stockholm

Book your seat today (Group limited to 30 participants)

email: booking@nordsip.com

or fill in the online form: <https://nordsip.com/si-intro/>



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