



STRATEGIES FOR QUANTIFYING & INTEGRATING RELEVANT ESG INDICATORS INTO THE INVESTMENT PROCESS – SYSTEMATIC OR STANDARDISED

Amsterdam 15 November - London 17 November 2016

An unique and independent executive training day for all investors with an interest in understanding and applying ESG metrics into the investment process. The course will offer a practical and usable methodology, allowing for enhanced portfolio analysis and (possible) performance through effective application of relevant ESG indicators into conventional investment processes.

Class size will be limited to 16 students in order to ensure practical and interactive delivery, so please do not hesitate to contact us for further details or to register.

Who should attend:

- Asset Owners
- Trustees
- Investment Managers
- ESG, CSR & Sustainability professionals
- ESG Research and Rating Agency Executives
- CFOs and Investor Relations Managers
- Enterprise Strategy / Risk Management executives
- Business Strategy and CSR Consultants
- Mainstream analysts
- ESG / Sustainability Analysts
- Accounting executives offering ESG solutions

HOW TO BOOK

Course details below and at GTQ International (<http://www.gtqinternational.com/index.php/training.html>) along with online registration link. Alternatively contact us for assistance:

Call: +44 (0)203 289 8895 OR email: Rual Kemp at rkemp@gtqinternational.com

Pricing and early registration discounts:

Single attendee: **£995 + 20% UK VAT** Super Early rate: **£745 + 20% UK VAT** (booked before 31/08/16)

Group discounts available upon request.

ABOUT THE COURSE

ESG integration is the strongest global sustainable investment trend with the highest absolute (2012: USD 5,8 trillion; 2014: USD 12,9 trillion) and relative (2012-2014: + 117%) growth rates. This is a practical interactive course for asset owners, trustees, investment managers, researchers, corporates executives about strategies to quantify & integrate relevant environmental, social and governance (ESG) key performance indicators (KPIs) into investment research & conventional investment processes, in a systematic and/or standardised manner.

Learning objectives include equipping attendees with the following information, training and techniques:

- Definitions and drivers of growth for ESG integration
- Fiduciary duty to consider ESG indicators relevant for the financial performance
- Duty to disclose relevant ESG indicators in annual / management reports of companies (EU Accounting Directives of 2003, 2013, 2014)
- (Scientific) development of regional and global standards for relevant ESG indicators, e.g. SD-KPI Standards, SASB
- Sector-specific examples of relevant ESG indicators
- Understanding that less [relevant Key Performance Indicators (KPIs), e.g. SD-KPIs] can be more
- Databases for relevant KPIs
- Integrated management & integrated reporting of relevant KPIs in the target & incentive system as well as balanced score cards of the top management of companies
- Different strategies of integrating relevant KPIs into conventional active, passive and quant investment strategies
- Mainstream equity indices integrating relevant KPIs
- Financial performance effects of integrating relevant ESG indicators into conventional investment processes
- Powerful engagement based on standardised KPIs

ABOUT THE TRAINER

DR AXEL HESSE, FREELANCER, SCIENTIST AND CONSULTANT FOR ESG INTEGRATION

- Twenty one years of experience in sustainable investments working with asset owners, investment managers, corporates, accountants, Ministries, European Commission, ESG rating and research agencies to enhance the integration of relevant ESG indicators into investment decisions and business practices (from niche to mainstream). Currently Director ESG Integration, METZLER AM GmbH and Shareholder of SD-M GmbH.
- Axel started to work on SRI / ESG in London in 1995, as a part of the famous NPI Global Care Fund team together with Tessa Tennant, Clare Brook, Anne-Maree O'Connor and Mark Campanale. In the executive board office of HypoVereinsbank (HVB Group; now part of UniCredit Group) he launched the first global product licensing the Dow Jones Sustainability Index in October 1999. He has worked as a consultant and independent scientist and produced numerous publications about relevant ESG indicators ("Sustainable Development Key Performance Indicators", SD-KPIs & SD-KPI Standards) and long-term sustainable institutional investments. In 2012, he founded SD-M GmbH to use his comprehensive knowledge and contacts to mainstream systematic & standardised ESG integration in conventional institutional investments.
- SD-M GmbH is the global pioneer for standardised ESG integration. SD-M provides SD-KPIInform® databases for more than 4.700 companies and countries worldwide, which is licensed to asset owners, investment managers and corporates for ESG integration (SD-KPIIntegration®). Its SD-KPIIntegration® Scores are also used for ESG integration in mainstream indices, e.g. EURO iSTOXX 50 SD-KPI and iSTOXX Europe 50 SD-KPI. More information about SD-KPIIntegration®
- Full biography can be found at: <https://www.linkedin.com/pub/dr-axel-hesse/8/168/ba3> or <http://www.sd-m.de/en/management.html>