

Sustainable Investing

05-08-2024 – 12-08-2024

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Saturday and Sunday, 3 and 4 August 2024		
Time	Activity	Description
12:00-18:00	Key pick up	You will find the exact key pick up location in the pre-departure information, which becomes available after you have paid the course fee.

Monday, 05-08-2024		
Time	Activity	Description
9:30-10:00	Welcome and Campus tour	
10:00-12:30	Meet & greet Introduction to Sustainable Investing	Definition of sustainable investing and its significance in the financial industry. Historical background and evolution of sustainable investing. The role of environmental, social, and governance (ESG) criteria. Principles and Approaches: Different approaches to sustainable investing, such as ESG integration, impact investing, and ethical investing. Principles and frameworks, including the UN Principles for Responsible Investment (PRI). ESG Analysis and Data: Understanding ESG factors and how they affect investments. Sources of ESG data and analysis methods. Evaluation of ESG scores and ratings.
12:30-13:30	Lunch*	
13:30-15:30	Start of the group assignment	
15:30-17:00	wrap up/summary	

Tuesday, 06-08-2024		
Time	Activity	Description
9:00-12:30	Sustainable Investment Strategies	Screening and exclusion criteria. Positive selection and thematic investing. Best-in-class and ESG leaders strategies. Integration of ESG into traditional financial analysis. Impact Measurement and Reporting: How to assess the environmental and social impact of investments. Metrics and tools for impact measurement. Reporting standards, such as the Global Reporting Initiative (GRI). Investment Products and Instruments: Sustainable mutual funds and ETFs. Green bonds and social impact bonds. Direct investments in sustainable companies or projects. Microfinance and community investments.
12:30-13:30	Lunch*	
13:30-15:30	Continuation of the group assignment	
15:30-17:00	Wrap up/summary	

Wednesday, 07-08-2024		
Time	Activity	Description
10:00-12:30	Guest lecture	Sustainable Investment Professional from an international asset management company, targeted at institutional investors

For more information about the Social Programme, please
visit the [Utrecht Summer School website!](https://www.summerschool.nl)

12:30-13:30	Lunch*	
13:30-15:30	Continuation of the group assignment	
15:30-17:00	Wrap up/summary	

Thursday, 08-08-2024		
Time	Activity	Description
10.00-12:30	Risk, return, costs and performance	<p>Risk and Return Considerations: Analyzing the potential impact of ESG factors on risk and returns. Evidence of the financial performance of sustainable investments. Market trends and correlations between ESG and financial performance.</p> <p>Regulatory and Legal Framework: Understanding regional and international regulations related to sustainable investing. Compliance and fiduciary duties. Reporting requirements and disclosure.</p> <p>Various cases: Analyzing real-world examples of successful sustainable investments. Examining challenges and failures in the field.</p> <p>Ethical and Ethical Considerations: Addressing ethical dilemmas and conflicts of interest. Aligning investments with personal values and beliefs.</p> <p>Practical Portfolio Management: Building a sustainable investment portfolio. Asset allocation and diversification. Rebalancing and ongoing monitoring.</p> <p>Emerging Trends and Future Outlook: Current trends in sustainable investing. Innovations and potential developments in the field.</p>
12:30-13:30	Travel to Amsterdam /Lunch*	
13:30-17:00	Visiting the Amsterdam Exchange	See this link: Amsterdam Exchange Experience euronext.com

Friday, 09-08-2024		
Time	Activity	Description
10:00-12:30	Finalization of the group assignment	
12:30-13:30	Lunch*	
13:30-15:00	Final presentation	Presentations
15:00-17:00	Saying goodbye	Drinks at The Basket

*Please note: Students must bring/cover their own lunch

The lunch times in the programme can vary, these times are just an indication.