

FINANCE & ACCOUNTING | COURSE BROCHURE

ESG Investing and Sustainable Finance

5 days | Classroom training | English

SMART HORIZON

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Course content

Why attend

Sustainable finance has moved from a niche activity to a core expectation of investors, lenders and regulators. This course explains how environmental, social and governance factors are integrated into investment, lending and corporate finance decisions. Participants examine ESG data and ratings, green and sustainability-linked financing instruments, EU sustainable finance regulation, climate-related financial risk and the prevention of greenwashing. Practical exercises cover ESG integration in portfolio analysis, evaluating green bond frameworks and assessing the credibility of sustainability claims.

Finance professionals increasingly need to understand how ESG factors affect risk, value and access to capital. This course gives you a practical understanding of sustainable finance instruments, regulation and analysis methods, enabling you to contribute confidently to ESG-related investment and financing decisions.

Professional Problems This Course Is Designed to Solve

• Difficulty translating subject knowledge into practical workplace decisions.
• Inconsistent approaches to the activities covered in the course outline.
• Lack of a structured plan for applying and reviewing new skills.

Course methodology

The course combines expert-led sessions with analysis of real sustainable finance transactions, ESG data exercises, regulatory case studies, group discussions and practical workshops on evaluating green and sustainability-linked instruments.

Course objectives

By the end of this course, participants will be able to:
• Explain the principles and market landscape of sustainable finance
• Integrate ESG factors into investment and credit analysis
• Evaluate green, social and sustainability-linked bonds and loans
• Understand key regulation including the EU Taxonomy and SFDR
• Assess climate-related financial risks and opportunities
• Identify and avoid greenwashing in products and disclosures



Course content

Target audience

This course is suitable for:
• Investment analysts and portfolio managers
• Corporate finance and treasury professionals
• Bankers and credit risk professionals
• Sustainability and ESG specialists working with finance teams
• Risk, compliance and investor relations professionals

Target competencies

Participants will develop competencies in:
• ESG integration
• Sustainable finance instruments
• EU sustainable finance regulation
• Climate risk analysis
• ESG data evaluation
• Greenwashing prevention

Course outline

Day 1: Foundations of Sustainable Finance

09:00–09:54	The growth of sustainable finance and investor expectations
09:54–10:48	ESG factors and their link to financial performance
10:48–11:00	Approaches: exclusion, integration, thematic and impact investing
11:00–11:30	**Coffee break**
11:30–12:12	Approaches: exclusion, integration, thematic and impact investing (continued)
12:12–13:06	Key market participants and initiatives
13:06–14:00	Exercise: Identifying material ESG issues for different sectors

Day 2: ESG Data, Ratings and Analysis

09:00–09:54	Sources of ESG data and their limitations
09:54–10:48	Understanding ESG ratings and why they differ
10:48–11:00	Integrating ESG into equity and credit analysis



Course content

11:00–11:30	**Coffee break**
11:30–12:12	Integrating ESG into equity and credit analysis (continued)
12:12–13:06	Materiality and sector-specific considerations
13:06–14:00	Exercise: ESG integration in a company valuation

Day 3: Sustainable Financing Instruments

09:00–09:54	Green, social and sustainability bonds
09:54–10:48	Sustainability-linked bonds and loans
10:48–11:00	Use-of-proceeds frameworks and external reviews
11:00–11:30	**Coffee break**
11:30–12:12	Use-of-proceeds frameworks and external reviews (continued)
12:12–13:06	Pricing, reporting and investor demand
13:06–14:00	Case study: Evaluating a green bond framework

Day 4: Regulation and Disclosure

09:00–09:54	EU Taxonomy and its technical screening criteria
09:54–10:48	Sustainable Finance Disclosure Regulation (SFDR)
10:48–11:00	Corporate sustainability reporting and its use by investors
11:00–11:30	**Coffee break**
11:30–12:12	Corporate sustainability reporting and its use by investors (continued)
12:12–13:06	Greenwashing risks and regulatory enforcement
13:06–14:00	Workshop: Reviewing a fund's sustainability disclosures

Day 5: Climate Risk and Strategy

09:00–09:54	Physical and transition risks in financial portfolios
09:54–10:48	Scenario analysis and stress testing
10:48–11:00	Net-zero commitments and transition plans



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11:00–11:30	**Coffee break**
11:30–12:12	Net-zero commitments and transition plans (continued)
12:12–13:06	Engagement and stewardship strategies
13:06–14:00	Capstone: Designing a sustainable finance strategy for an organisation

The timings provided are estimates and may vary depending on the number of participants and the discussions taking place during the sessions. They are indicative only and do not constitute a binding commitment.

Dates, venues and fees

Current published course plans. Fees are per participant in GBP, excluding unconfirmed taxes.

Venue	Start date	End date	Fee (GBP)
Istanbul Confirmed dates	9 Nov 2026	13 Nov 2026	**£2,650.-**
Online Confirmed dates	9 Nov 2026	13 Nov 2026	**£1,250.-**
Amsterdam Confirmed dates	23 Nov 2026	27 Nov 2026	**£2,540.-**
Online Confirmed dates	23 Nov 2026	27 Nov 2026	**£1,250.-**
Singapore Confirmed dates	7 Dec 2026	11 Dec 2026	**£2,820.-**
Online Confirmed dates	7 Dec 2026	11 Dec 2026	**£1,250.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
London Confirmed dates	14 Dec 2026	18 Dec 2026	**£2,450.–**
Online Confirmed dates	14 Dec 2026	18 Dec 2026	**£1,250.–**
Rome Confirmed dates	4 Jan 2027	8 Jan 2027	**£2,450.–**
Online Confirmed dates	4 Jan 2027	8 Jan 2027	**£1,250.–**
Dubai Confirmed dates	11 Jan 2027	15 Jan 2027	**£3,150.–**
Online Confirmed dates	11 Jan 2027	15 Jan 2027	**£1,250.–**
Frankfurt Confirmed dates	25 Jan 2027	29 Jan 2027	**£2,650.–**
Online Confirmed dates	25 Jan 2027	29 Jan 2027	**£1,250.–**
Kuala Lumpur Confirmed dates	8 Feb 2027	12 Feb 2027	**£1,450.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	8 Feb 2027	12 Feb 2027	**£1,250.–**
Paris Confirmed dates	22 Feb 2027	26 Feb 2027	**£2,860.–**
Online Confirmed dates	22 Feb 2027	26 Feb 2027	**£1,250.–**
Vienna Confirmed dates	1 Mar 2027	5 Mar 2027	**£2,940.–**
Online Confirmed dates	1 Mar 2027	5 Mar 2027	**£1,250.–**
Istanbul Confirmed dates	8 Mar 2027	12 Mar 2027	**£2,650.–**
Online Confirmed dates	8 Mar 2027	12 Mar 2027	**£1,250.–**
Amsterdam Confirmed dates	22 Mar 2027	26 Mar 2027	**£2,540.–**
Online Confirmed dates	22 Mar 2027	26 Mar 2027	**£1,250.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Singapore Confirmed dates	12 Apr 2027	16 Apr 2027	**£2,820.-**
Online Confirmed dates	12 Apr 2027	16 Apr 2027	**£1,250.-**
London Confirmed dates	26 Apr 2027	30 Apr 2027	**£2,450.-**
Online Confirmed dates	26 Apr 2027	30 Apr 2027	**£1,250.-**
Cape Town Confirmed dates	3 May 2027	7 May 2027	**£1,890.-**
Online Confirmed dates	3 May 2027	7 May 2027	**£1,250.-**
Dubai Confirmed dates	10 May 2027	14 May 2027	**£3,150.-**
Online Confirmed dates	10 May 2027	14 May 2027	**£1,250.-**
Frankfurt Confirmed dates	24 May 2027	28 May 2027	**£2,650.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	24 May 2027	28 May 2027	**£1,250.–**
Kuala Lumpur Confirmed dates	14 Jun 2027	18 Jun 2027	**£1,450.–**
Online Confirmed dates	14 Jun 2027	18 Jun 2027	**£1,250.–**
Paris Confirmed dates	21 Jun 2027	25 Jun 2027	**£2,860.–**
Online Confirmed dates	21 Jun 2027	25 Jun 2027	**£1,250.–**
Barcelona Confirmed dates	5 Jul 2027	9 Jul 2027	**£2,840.–**
Online Confirmed dates	5 Jul 2027	9 Jul 2027	**£1,250.–**
Istanbul Confirmed dates	12 Jul 2027	16 Jul 2027	**£2,650.–**
Online Confirmed dates	12 Jul 2027	16 Jul 2027	**£1,250.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Amsterdam Confirmed dates	26 Jul 2027	30 Jul 2027	**£2,540.-**
Online Confirmed dates	26 Jul 2027	30 Jul 2027	**£1,250.-**
Singapore Confirmed dates	9 Aug 2027	13 Aug 2027	**£2,820.-**
Online Confirmed dates	9 Aug 2027	13 Aug 2027	**£1,250.-**
London Confirmed dates	23 Aug 2027	27 Aug 2027	**£2,450.-**
Online Confirmed dates	23 Aug 2027	27 Aug 2027	**£1,250.-**
Cape Town Confirmed dates	30 Aug 2027	3 Sept 2027	**£1,890.-**
Online Confirmed dates	30 Aug 2027	3 Sept 2027	**£1,250.-**
Dubai Confirmed dates	13 Sept 2027	17 Sept 2027	**£3,150.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	13 Sept 2027	17 Sept 2027	**£1,250.–**
Frankfurt Confirmed dates	20 Sept 2027	24 Sept 2027	**£2,650.–**
Online Confirmed dates	20 Sept 2027	24 Sept 2027	**£1,250.–**
Kuala Lumpur Confirmed dates	11 Oct 2027	15 Oct 2027	**£1,450.–**
Online Confirmed dates	11 Oct 2027	15 Oct 2027	**£1,250.–**
Paris Confirmed dates	25 Oct 2027	29 Oct 2027	**£2,860.–**
Online Confirmed dates	25 Oct 2027	29 Oct 2027	**£1,250.–**
Rome Confirmed dates	1 Nov 2027	5 Nov 2027	**£2,450.–**
Online Confirmed dates	1 Nov 2027	5 Nov 2027	**£1,250.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Istanbul Confirmed dates	8 Nov 2027	12 Nov 2027	**£2,650.–**
Online Confirmed dates	8 Nov 2027	12 Nov 2027	**£1,250.–**
Amsterdam Confirmed dates	22 Nov 2027	26 Nov 2027	**£2,540.–**
Online Confirmed dates	22 Nov 2027	26 Nov 2027	**£1,250.–**
Singapore Confirmed dates	6 Dec 2027	10 Dec 2027	**£2,820.–**
Online Confirmed dates	6 Dec 2027	10 Dec 2027	**£1,250.–**
London Confirmed dates	13 Dec 2027	17 Dec 2027	**£2,450.–**
Online Confirmed dates	13 Dec 2027	17 Dec 2027	**£1,250.–**



Course content

Plan your next step

Dates, availability, exact venue, taxes, inclusions and payment terms require written confirmation. This brochure is not a quotation, registration, booking confirmation or visa invitation. Participants receive a Smart Horizon UK certificate of attendance; programmes are not externally accredited and do not award a professional qualification or designation. Confirm arrangements before booking travel.

For group or in-house training, contact our learning team to discuss your objectives and delivery arrangements.

Contact Smart Horizon

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