

Course No. 1489

ESG Investing & Sustainable Finance Training Course

**INVESTMENT & ASSET MANAGEMENT
FINANCE, INVESTMENT & BANKING**

DURATION

5 Days

LOCATION

Lisbon, Portugal

DELIVERY

Classroom

DATES

12 – 16 Oct 2026



Scheduled Event Details

CITY	Lisbon, Portugal
DATE	12 – 16 Oct 2026
DELIVERY TYPE	Classroom
COURSE FEE	€5,400

Course Overview

The ESG Investing & Sustainable Finance Training Course provides a comprehensive professional framework for understanding how environmental, social, and governance considerations are integrated into investment decisions, financial strategy, risk management, and long-term organizational value creation. The course is designed for professionals who need to understand the rapidly evolving role of sustainability in financial markets and how ESG factors can influence investment analysis, portfolio construction, corporate finance, and institutional decision-making.

Participants will explore the principles of sustainable finance, responsible investment, ESG integration, sustainability-linked financial instruments, climate-related financial risks, and ESG performance assessment. The program connects sustainability concepts with practical financial decision-making, enabling participants to evaluate opportunities and risks using both conventional financial analysis and relevant ESG considerations. Particular attention is given to the relationship between sustainability performance, corporate value, risk exposure, stakeholder expectations, and access to capital.

The course also examines how banks, institutional investors, asset managers, corporations, government entities, and public-sector organizations are incorporating ESG principles into investment policies, financing strategies, governance frameworks, and risk management processes. Participants will gain a practical understanding of how ESG information can be assessed, challenged, and incorporated into financial analysis without treating sustainability considerations as a separate or purely reputational function.

Through practical exercises, case discussions, investment analysis activities, and implementation workshops, participants will develop the ability to translate ESG principles into actionable financial and investment decisions. The course supports organizations seeking to strengthen sustainable investment capabilities, improve risk awareness, enhance governance, and align financial strategies

with evolving sustainability expectations and long-term organizational objectives.

Objectives

- Analyze the core principles of ESG investing and sustainable finance and explain their relevance to modern investment and financial decision-making by the end of the first day.
- Evaluate environmental, social, and governance factors and determine their potential relevance to investment risk, return, valuation, and long-term business performance during practical case exercises.
- Apply ESG integration techniques to investment analysis and assess how sustainability-related information can influence investment decisions by the end of the course.
- Develop an ESG-focused investment assessment framework that incorporates material sustainability factors, financial considerations, risk indicators, and organizational objectives.
- Assess climate-related and broader sustainability risks and evaluate their potential impact on corporate financial performance, portfolios, financing decisions, and institutional risk exposure.
- Design practical approaches for integrating ESG considerations into portfolio management, investment policies, asset allocation, and financial decision-making within an organizational context.
- Evaluate sustainable finance instruments, including green bonds, social bonds, sustainability-linked bonds, and other sustainability-oriented financing mechanisms, based on their purpose, structure, risks, and suitability.
- Strengthen the ability to assess ESG data, ratings, disclosures, and performance indicators while identifying limitations, inconsistencies, and potential greenwashing risks.
- Develop practical recommendations for improving ESG governance, investment processes, stakeholder accountability, and sustainability-related financial decision-making.
- Align ESG investing and sustainable finance practices with organizational strategy, risk management priorities, governance requirements, and long-term value creation objectives by completing a final implementation exercise.

Who Should Attend

This ESG Investing & Sustainable Finance Training Course is designed for investment professionals, portfolio managers, asset managers, financial analysts, corporate finance professionals, treasury specialists, risk managers, and professionals involved in investment research, financial planning, capital allocation, or sustainable investment activities. It is also highly

relevant to professionals working in banking, private banking, wealth management, insurance, pension funds, sovereign and institutional investment environments, and financial services organizations.

The course is suitable for executives, senior managers, investment committee members, finance directors, chief financial officers, risk and compliance managers, sustainability and ESG professionals, corporate strategy teams, governance specialists, and decision makers responsible for financial strategy and organizational performance. It is particularly valuable for government entities, ministries, public-sector organizations, oil and gas companies, large corporations, banks, and financial institutions seeking to strengthen their understanding of sustainable finance and incorporate ESG considerations into investment, financing, and risk management decisions.

Learning Outcomes

- Explain the structure, principles, drivers, and strategic importance of ESG investing and sustainable finance in contemporary financial markets.
- Distinguish between ESG integration, responsible investment, impact investing, thematic investing, and other sustainability-oriented investment approaches.
- Assess material environmental, social, and governance factors and determine their relevance to specific companies, sectors, portfolios, or investment opportunities.
- Incorporate ESG information into fundamental financial analysis, company assessment, investment screening, and portfolio decision-making.
- Evaluate climate-related risks, transition risks, physical risks, and other sustainability factors that may affect financial performance and investment value.
- Analyze ESG ratings, sustainability disclosures, performance indicators, and other ESG data sources while recognizing data quality and comparability limitations.
- Evaluate green, social, sustainability, and sustainability-linked financing instruments and determine their potential application within different organizational and investment contexts.
- Identify potential greenwashing, weak ESG practices, misleading sustainability claims, and governance weaknesses during investment and financing assessments.
- Assess the potential relationship between ESG performance, financial risk, corporate resilience, access to capital, and long-term value creation.
- Develop an ESG investment or sustainable finance implementation framework that can be adapted to an organization's strategic, financial, and risk management priorities.

Course Outline

DAY 01

Foundations of ESG Investing and Sustainable Finance

- Evolution of sustainable finance and responsible investment
- Environmental, social, and governance factors in financial decision-making
- Key drivers of ESG adoption across financial markets and organizations
- ESG investing versus traditional investing, responsible investment, and impact investing
- Materiality, sustainability issues, stakeholder expectations, and long-term value creation

PRACTICAL APPLICATION

ESG materiality assessment for a selected company or investment opportunity

DAY 02

ESG Integration, Investment Analysis and Portfolio Management

- ESG integration within fundamental investment analysis
- Environmental factors: climate exposure, resource efficiency, emissions, energy transition, and environmental risk
- Social factors: workforce practices, human capital, supply chains, communities, and stakeholder relationships
- Governance factors: board effectiveness, ownership structures, executive incentives, ethics, controls, and transparency
- ESG screening, scoring, benchmarking, and investment selection

PRACTICAL APPLICATION

integrating ESG factors into an investment assessment and portfolio decision

DAY 03**ESG Risk Management, Climate Risk and ESG Data**

- ESG risk identification, assessment, monitoring, and reporting
- Climate-related financial risks and their implications for organizations and portfolios
- Physical risks, transition risks, technology risks, regulatory risks, and market risks
- ESG data sources, ratings, metrics, disclosures, and analytical limitations
- Assessing data quality, comparability, assumptions, and inconsistencies
- Greenwashing risks and evaluating the credibility of sustainability claims

PRACTICAL APPLICATION

ESG risk assessment and analysis of a hypothetical investment portfolio

DAY 04**Sustainable Finance Instruments and Strategic Applications**

- Principles and applications of sustainable finance
- Green bonds and green financing structures
- Social bonds and sustainability-oriented financing
- Sustainability-linked bonds and performance-based financing
- Sustainable loans and other sustainability-related financial instruments
- ESG considerations in corporate finance, banking, treasury, and investment strategy

PRACTICAL APPLICATION

evaluating the suitability of sustainable finance instruments for an organization

DAY 05**ESG Governance, Investment Strategy and Implementation**

- Developing ESG investment policies and decision-making frameworks
- Integrating ESG considerations into investment committees and governance structures
- ESG performance monitoring, reporting, and management information

DAY 05 — CONTINUED

- Aligning sustainable finance with corporate strategy, risk management, and financial objectives
- Building organizational capabilities for ESG investing and sustainable finance

FINAL WORKSHOP

develop an ESG investment or sustainable finance implementation action plan

- Presentation, peer review, and refinement of implementation recommendations

Register or Request More Information

Course page: <https://quest-training.com/courses/esg-investing-sustainable-finance-training-course>

Website: <https://quest-training.com>

Email: info@quest-training.com

Phone: +905016771440