Integrating ESG into Financial Modelling and Portfolio Analysis

COURSE OVERVIEW

Integrating ESG into Financial Modelling and Portfolio Analysis is a specialized course that teaches how to incorporate Environmental, Social, and Governance (ESG) factors into quantitative financial models and investment portfolio analysis. The course explores methods for embedding ESG data into valuation, risk, and performance metrics, equipping participants to design investment strategies that merge financial returns with sustainability objectives and meet evolving regulatory and market demands.

WHO SHOULD ATTEND?

This course is intended for finance professionals, investment managers, portfolio analysts, sustainability officers, risk managers, corporate strategists, consultants, and anyone involved in asset management or responsible investing who seeks to enhance their expertise in ESG-integrated financial decision-making.

COURSE OUTCOMES

Delegates will gain the skills and knowledge to:

- Understand ESG principles and why they matter in finance.
- Integrate ESG metrics and disclosures into financial models.
- Analyze ESG impacts on valuations, risks, and returns.
- Develop ESG-adjusted portfolio strategies and performance assessments.
- Apply regulatory and reporting frameworks for ESG investing.

KEY COURSE HIGHLIGHTS

At the end of the course, you will understand;

- Definition and importance of ESG in financial analysis.
- Techniques for sourcing and applying ESG data.
- Methods for ESG risk and opportunity assessment.
- ESG integration in valuation and forecasting models.
- Portfolio-level ESG impact analysis.
- Case studies of ESG-driven investment decisions.
- Regulatory and disclosure standards overview.
- Addressing data credibility and greenwashing issues.
- Trends in ESG investing and global best practices.

All our courses are dual-certificate courses. At the end of the training, the delegates will receive two certificates.
1. A GTC end-of-course certificate
2. Continuing Professional Development (CPD) Certificate of completion with earned credits awarded