

# RESPONSIBLE INVESTMENT IN PRACTICE

The PRI's unique, three-stage  
blended learning approach to  
ESG and RI training



# OVERVIEW

The **Responsible Investment in Practice** certificate programme, designed and developed by the PRI, equips participants with essential foundational knowledge of the core principles and concepts in responsible investment (RI).

The PRI’s industry-leading three-stage training approach combines classroom and online training modules, to fully instill in participants a strong, functional understanding and a confident fluency when discussing ESG issues. Participants leave the programme with the knowledge and skills required to understand, manage and integrate ESG considerations into their business operations and investment strategies.

PRI Academy is delighted to be offering this course to attendees of the APAFS Fiduciary Events Week 2024.

DATES	Commencing 20 November 2024
DURATION	<p><b>In-person and online over six months</b></p> <ul style="list-style-type: none"><li>▪ One-day classroom session in-person</li><li>▪ 15-hour, self-paced online module (available over six months)</li><li>▪ Live virtual classroom session</li></ul>
LOCATION	<p><b>New World Hotel,</b></p> <p>Makati, Manila,</p> <p>Philippines</p>
CERTIFICATION	Upon completion of the six-month programme, participants will receive an industry recognised PRI certification.

# PROGRAMME STRUCTURE



The three-stage, multi-format learning approach is designed to solidify ESG understanding and retention through a multi-faceted process.

It begins in the classroom, where the core foundations of ESG and RI are covered. This is followed by a leading PRI Academy e-learning course building on the classroom session in a flexible and engaging online format. Finally, a virtual 'RSQ - Refresh, Socialise, and Question' session occurs six months after the initial classroom, providing updates on key industry changes, discussions on applying course learnings, and opportunities to pose questions to PRI expert instructors. With this multi-stage, multi-format approach, ESG and RI education becomes a substantive, ongoing endeavour rather than a one-time, tick-box exercise.

# 1

## CLASSROOM

Participants begin by covering the core foundations of ESG and RI, building an understanding of key concepts and how these are applied in day-to-day practice.

# 2

## ONLINE

Participants reinforce and broaden their knowledge with PRI's flagship, self-paced online learning course, Applied RI.

The course provides a comprehensive examination of responsible investment, from theory to practice.

# 3

## RSQ (REFRESH, SOCIALISE AND QUESTION)

Participants return for a 90-minute classroom session, six months after the initial teaching. This is an opportunity to hear key industry updates and discuss how participants have applied their ESG learnings.

# LEARNING OUTCOMES

The *Responsible Investment in Practice* programme provides a comprehensive examination of responsible investment from theory to practical application and integration. Participants will learn to identify and manage ESG risks and opportunities, engage confidently with key industry issues and develop a systematic approach to incorporating ESG considerations in their work.

## 1 CLASSROOM

- Examine the key drivers of responsible investment, including financial materiality, client demand, policy and regulation, fiduciary duties and sustainability outcomes.
- Explore responsible investment approaches, including screening, integration, and thematic investing, with case studies spotlighting industry best practices.
- Analyse the process of integrating ESG into investment strategies including active fundamental, active quantitative and passive index design.
- Complete a corporate analysis of publicly held multinational consumer products company and high yield European telecom company: including reviewing ESG rankings, ESG issue scoring, materiality mapping, revenue forecasting.
- Learn the fundamental principles involved in implementing climate commitments, including disclosure and measurement, strategy and targets, investment process, capital allocation decisions and engagement activities.
- Examine ESG integration in multi asset portfolios, including ESG issues in strategic asset allocation, capital markets expectations and mean variance optimisation and factor risk allocation.

## 2 ONLINE

- Examine material ESG issues, trends and themes and how these fit into models and ratio work.
- Compare traditional analysis versus ESG analysis and how this relates to investment decision making.
- Understand practical approaches for ESG analysis at global, regional, industry and company levels.
- Identify corporate governance processes, best practice, key standards, frameworks and stakeholders.
- Understand models of stewardship and engagement and design an engagement policy.
- Identify key considerations to implement a successful company-wide responsible investment programme.
- Use ESG data to assess ESG performance and integrate this within financial modelling.
- Employ accurate, consistent terminology and a common language of ESG when communicating internally with colleagues and externally with clients and stakeholders.

## 3 RSQ

- Build confidence discussing and applying ESG concepts.
- Refresh and reinforce knowledge from the initial training.
- Discuss with fellow participants and PRI experts common challenges and opportunities of bringing responsible investment techniques into day-to-day work and build an expectation of ESG incorporation within daily work.
- Explore updates on any major responsible investment industry developments, both regionally and worldwide.





## UN Partners

UNEP Finance Initiative  
UN Global Compact

# 5300+

## Global Signatories

Asset Owners  
Investment Managers  
Service Providers

# \$121tn

## AUM

Total assets under  
management of all  
PRI signatories

# 5000+

## Enrolments per annum

# 88

Countries  
represented by  
participants

# 98%

Satisfaction  
rate



The United Nations-supported Principles for Responsible Investment (PRI) is the world's leading proponent of responsible investment. It works:

- to understand the investment implications of environmental, social and governance (ESG) factors;
- to support its international network of investor signatories in incorporating these factors into their investment and ownership decisions.

The PRI acts in the long-term interests:

- of its signatories;
- of the financial markets and economies in which they operate;
- and ultimately of the environment and society as a whole.



As part of the PRI, the PRI Academy delivers world-leading ESG training for the global financial sector. The PRI Academy's short, practical and applied responsible investment courses equip industry professionals with a common language of ESG, based on the latest thinking in responsible investment.

# WHO IS THE COURSE FOR?

PRI's unique, three-stage training course takes participants from the key foundations of responsible investment, through to an intermediate understanding of ESG issues and analysis.

At all stages, relevant, real-life examples and case studies are used so that learners can begin to see the direct relationship between the content being taught, their day-to day work, and the practical steps they could take to meet their organisations ESG and RI commitments.

The course is aimed at any investment industry professional, regardless of job function or level, who needs to rapidly develop their responsible investment knowledge and competency to best fulfil their role.

Suitable for:

- Fund Sponsors
- Fund Trustees & Directors
- Investment Committee Members
- Executive Directors
- Fund Administrators
- Legislators
- Accountants
- Lawyers
- Investment Advisors

Get in touch

[www.priacademy.org](http://www.priacademy.org)

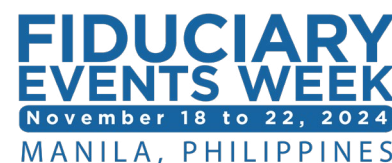
[priacademy@unpri.org](mailto:priacademy@unpri.org)

[www.apafs.org](http://www.apafs.org)

[admin@apafs.org](mailto:admin@apafs.org)

+44 (0) 20 3714 3168

## ORGANISER



Founded in 2000, APAFS is a Guam based 501(c)(3) non-profit association whose goal is to raise the level of competence and standards of practice among fiduciaries throughout the Asia Pacific region.

## DELIVERY PARTNER



The PRI Academy is part of the Principles for Responsible Investment (PRI), the world's leading proponent of responsible investment. Leveraging the PRI's unique expertise, industry connections and independent global perspective, the PRI Academy leads the way in applied responsible investment training for industry professionals, delivered in a flexible and engaging online format.

### Important notes :

- Registration information can be found at [www.apafs.org](http://www.apafs.org).
- Upon course registration, it is expected that the same individual will attend the sessions throughout the entire duration.
- The PRI Certificate will be awarded to participants who have successfully completed the programme, with a 100% attendance of the in-person and virtual modules.

For registration support or any other queries, please contact [admin@apafs.org](mailto:admin@apafs.org).