

Below is a map of the different topics, modules and sections so you can see exactly what's covered in the **Spotlight: ESG and Sustainable Investment Advice** course.

Foundations		
Background to ESG - the basics	The role of finance	Structure
<ul style="list-style-type: none"> <li>• Sustainability and why it's relevant to finance</li> <li>• Climate change</li> <li>• Net zero</li> <li>• Planetary boundaries and environmental challenges</li> <li>• Social justice and equality</li> <li>• Improving corporate accountability and governance</li> <li>• The UN Sustainable Development Goals</li> </ul>	<ul style="list-style-type: none"> <li>• What types of sustainable investments are available?</li> <li>• What is ESG?</li> <li>• Equity ownership</li> <li>• Sustainable fixed income and debt investing</li> <li>• Does investing sustainably make a difference?</li> </ul>	<ul style="list-style-type: none"> <li>• The differences between ethical and sustainable investing</li> <li>• Sustainable finance and the Code of Ethics</li> <li>• Sustainable finance and the Consumer Duty</li> <li>• Governmental and international standards</li> </ul>

Investing		
Designing a sustainable portfolio	Practical steps to constructing a portfolio	Risk vs. return
<ul style="list-style-type: none"> <li>• What sustainable investment portfolios do firms need to have?</li> <li>• What type of of sustainable investment portfolios do firms want to have?</li> </ul>	<ul style="list-style-type: none"> <li>• Asset allocation</li> <li>• Diversification</li> <li>• Evaluating sustainable investment funds</li> <li>• Active vs. passive</li> <li>• Research and due diligence</li> </ul>	<ul style="list-style-type: none"> <li>• Implications for risk of a portfolio</li> <li>• Implications for return of a portfolio</li> </ul>

# Clients

## Ethics and client motivators

- Understanding ethics
- What do clients want?

## Educating clients about sustainable investing

- Advantages of client education, content, delivery

## Understanding a client's sustainable preferences

- How to understand a client's sustainable preferences

## Maintaining client engagement

- How to maintain client engagement

# Leadership

## Legislation and regulation

- Becoming a leader in sustainable finance
- Regulation as a booster, not a block
- The Consumer Duty – product and service design

## The Leaders

- Interviews with leaders on sustainable finance

## Making sustainable finance work for you

- How to make sustainable finance work for you and your firm