



A presentation for:

COMPANY_NAME

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The PRI Academy

The PRI Academy
leads the way in
**applied responsible
investment training**
for industry
professionals



Unique
Expertise



Industry
Connections



Global
**Independent
perspective**

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15,000+

Enrolments since 2014



88

Countries represented
by participants



97%

Satisfaction rate

Problem and value proposition

There is a well recognised industry skills-gap, and a lack of expertise presents a significant obstacle to successful ESG incorporation.

The PRI Academy provides practical and applied online responsible investment training for organisations and industry professionals.



**PRACTICAL
AND APPLIED**



**DESIGNED BY
SUBJECT MATTER
EXPERTS**



**AVAILABLE
GLOBALLY**



**FLEXIBLE
AND WEB-BASED**

A holistic solution

We partner with our clients and support them throughout all stages of the training process.

In particular, we help organisations to:

- Meet their policies for supplier onboarding, data security and privacy;
- Identify the most appropriate training solutions for their teams;
- Build internal messaging, and develop streamlined approaches to enrolling team members;
- Provide detailed reporting on course completion and learner feedback.



Company-wide training

Customisation

Integrate seamlessly with an organisation's existing responsible investment strategy

Customised co-branded ESG content tailored for your organisation's needs.



OPTIONS INCLUDE

- ✓ Company logos and branding
- ✓ Mission statements and approach to responsible investment
- ✓ Messages from senior management
- ✓ Company-specific learning material e.g. modules and case studies

Other features

- ✓ Dedicated company 'branch' with supervisor access and reporting
- ✓ Regular progress reports on enrolments/usage
- ✓ Technical support

Relaunching the Academy

October 2021



More INSIGHTS, better USER EXPERIENCE and new CREDENTIALS validation...

- ✓ Refined offering and value proposition;
- ✓ Provided a modern user-friendly learning experience;
- ✓ Delivered a complete overhaul of the Academy's courses;
- ✓ Updated policy and regulatory content, including the EU Taxonomy, NGFS, IPR;
- ✓ Added practical examples of ESG in fixed income;
- ✓ Introduced digital badges and credentials.

The PRI Academy's offering



Our course offering

COURSE OPTIONS



Understanding responsible investment



Applied responsible investment



Advanced responsible investment analysis

YOU WILL LEARN HOW TO



Identify & Manage

ESG risks and opportunities in investment and business decisions



Identify, Assess & Incorporate

ESG risks and opportunities in investment and ownership decisions



Identify, Assess & Model

ESG risks and opportunities in investment and ownership decisions

Understanding RI

An introduction to ESG

Understanding RI is an introduction to responsible investment.

The course provides insights into the materiality of environmental, social and governance (ESG) issues and introduces a systematic approach to incorporating ESG factors into investment decisions and active ownership.

Designed for

- Client-facing staff
- Sales & marketing professionals
- Business executives.

Duration

3 hours

Price

£275



LEARNING OUTCOMES

- ✓ Define responsible investment.
- ✓ Recognise ESG issues, trends and themes
- ✓ Compare traditional analysis versus ESG analysis and how this relates to investment decision making
- ✓ Recognise the key material impacts of corporate governance
- ✓ Identify the role and outcomes of engagement

Applied RI

Identifying and implementing ESG factors

Applied RI is our flagship training programme, providing a comprehensive examination of responsible investment from theory to practice.

The course trains investment professionals to identify and analyse material environmental, social and governance (ESG) factors and to integrate sustainability data into financial modelling and existing investment processes.

Designed for

- Investment analysts and Portfolio managers
- Sustainability analysts and Product specialists
- Others in financial or professional services

Duration

15 hours

Price

£700



LEARNING OUTCOMES

- ✓ Define responsible investment
- ✓ Recognise 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 level
- ✓ Identify corporate governance processes, best practice, key standards, frameworks and stakeholders
- ✓ Understand models of engagement and design an engagement policy
- ✓ Identify key considerations to implement a successful company-wide responsible investment programme
- ✓ Integrate ESG data in financial modelling

Advanced RI Analysis

Integrating ESG for advanced investment decision-making

Advanced RI Analysis provides an in-depth look at the use of sustainability data in fundamental investment analysis and stock valuation.

The course helps investment practitioners develop a keen awareness of ESG factors and an understanding of when, where and how non-financial information can be used to add value in the investment decision making process.

Designed for

- Investment analysts
- Portfolio managers

Duration

10 hours

Price

£700



LEARNING OUTCOMES

- ✓ Identify ESG factors and indicators that can affect financial performance
- ✓ Understand how to assess the materiality of ESG factors
- ✓ Understand the approaches and options for ESG analysis and integration
- ✓ Apply ESG factors into financial models
- ✓ Identify the many uses of sustainability data
- ✓ Evaluate how a company's fair value is impacted when adjusted to ESG performance
- ✓ Recognise emerging regulations and standards linked to global sustainability goals, and understand their potential impact on business

RI for Trustees

RI perspectives for trustee and board members

This course outlines the importance of RI for trustee and board members, and the steps involved in becoming a responsible trustee.

It clarifies how ESG impacts business and investment decision making through financial modelling, case studies, interactive spreadsheets and implementation guides.

Designed for	Duration
▪ Board members	1.5 hours
Languages	Price
▪ English, French, Chinese	£???



LEARNING OUTCOMES

- ✓ Explain why sustainability issues are important for pension funds
- ✓ Work with your board, executive team and others to develop and implement a responsible investment strategy that matches your fund's overall objectives
- ✓ Identifying the relationship between ESG analysis and investment decision making
- ✓ Ensure that your strategy is kept up to date

Course overview and pricing

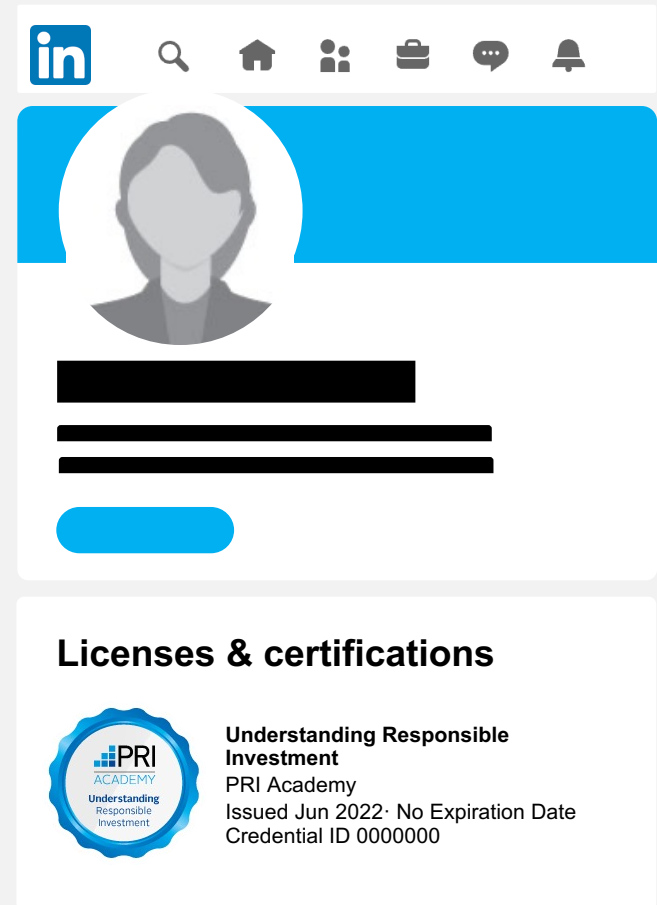
Understanding RI	Applied RI	Understanding RI
Designed to build the knowledge and confidence to discuss ESG issues with clients and stakeholders	Our flagship course, taking the learner from ESG theory into practical application and integration	Focusses on the use of ESG data and the incorporation of ESG factors into fundamental investment analysis
3 hours	15 hours	10 hours
£275	£700	£700

DISCOUNTS

PRI signatories are eligible for a 20% signatory discount on the list price, and we offer 25% - 40% enterprise discounts depending upon the size of the enrolment.

Digital Badges and Credentials

- An easy way for learners to showcase their achievement on LinkedIn, emails footers etc.;
- A means for organisations to highlight their genuine commitment to responsible investment through education and training;
- A link to easily and publicly verify the authenticity of PRI Academy certificates.



What they say about us

“At ABN AMRO sustainable investment is the default option for new clients. We offer a continuous education programme to our investment advisors and more than 1500 of my colleagues have completed training with PRI Academy, ensuring they have an extensive understanding of ESG issues and helping ABN AMRO to meet its sustainable investment targets.”

Vincent Triesschijn,
Director Sustainable Investment, ABN AMRO

“PRI Academy is a long-time partner, providing training on RI and the investment process. Their courses use real-life case studies to illustrate the materiality of ESG issues, helping our employees further in their understanding of the market and our clients’ needs.

“Academy courses are part of our onboarding and internal training programs for all employees, and they are highly appreciated and well used..”

Marguerite Fraser
Global head of Learning & Development, Sustainalytics

Thank you

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