Sustainable Finance and Green Bond Investment Strategies Training Course



26 - 30 Oct 2026

Lisbon

4500 € (Per Person)

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Course Introduction / Overview:

The global financial landscape is undergoing a profound transformation, driven by the urgent need to address climate change and social inequalities. Sustainable finance has evolved from a niche interest to a mainstream imperative, fundamentally reshaping investment decisions and corporate strategies. This course provides a comprehensive exploration of this dynamic field, focusing on the principles of Environmental, Social, and Governance (ESG) integration and the practical application of green bond investment strategies. Drawing on the foundational work of academics like Dr. Robert Eccles on integrated reporting, we will delve into how non-financial metrics create long-term value. Participants will gain insights from frameworks discussed in publications such as "Sustainable Investing: A Path to a New Horizon," learning to navigate the complexities of the green bond market, from issuance to impact assessment. BIG BEN Training Center has designed this program to equip professionals with the analytical tools and strategic foresight necessary to lead in the transition to a sustainable economy, turning regulatory pressures and market shifts into tangible investment opportunities and sustainable corporate growth. This is more than a course on finance; it is a guide to becoming a key player in the future of responsible capital allocation.

Target Audience / This training course is suitable for:

- Financial Analysts and Investment Professionals.
- Portfolio Managers and Asset Managers.
- Corporate Finance and Treasury Officers.
- Sustainability and Corporate Social Responsibility (CSR) Managers.
- Risk Management Professionals.
- Banking and Credit Analysts.
- Government Regulators and Public Sector Finance Officials.
- Investor Relations Specialists.
- Consultants in Finance and Sustainability.
- Compliance Officers.

Target Sectors and Industries:

- Banking and Financial Services.
- Asset Management and Investment Funds.
- Insurance and Pension Funds.
- Energy and Utilities (including renewable energy).
- Real Estate and Infrastructure Development.
- Manufacturing and Industrial Goods.
- Government Agencies and Public Finance Institutions.
- International Development Organizations.
- Consulting and Professional Services.
- Technology and Innovation.

Target Organizations Departments:

- Finance Department.
- Investment and Portfolio Management Department.
- Sustainability and ESG Department.
- Corporate Strategy and Development Department.
- Risk Management Department.
- Treasury Department.
- Investor Relations Department.
- Legal and Compliance Department.
- Project Finance Department.
- Research and Analysis Department.

Course Offerings:

By the end of this course, the participants will have able to:

- Master the core principles of sustainable finance and ESG criteria.
- Analyze the structure and dynamics of the global green bond market.
- Evaluate green bond investment opportunities using robust analytical frameworks.
- Integrate ESG factors into traditional financial analysis and valuation models.
- Develop and implement effective sustainable investment strategies for portfolios.
- Understand the green bond issuance, certification, and reporting processes.
- Assess and manage climate-related financial risks and opportunities.
- Measure and report on the environmental and social impact of investments.
- Navigate the evolving regulatory landscape for sustainable finance.
- Communicate sustainable investment strategies effectively to stakeholders.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be immersive, practical, and highly interactive, ensuring that participants can immediately apply their learning in a professional context. We move beyond traditional lectures to create a dynamic learning environment built on a foundation of real-world application. The course heavily utilizes case studies of landmark green bond issuances and successful ESG integration strategies from leading global corporations. Participants will engage in hands-on financial modeling exercises to evaluate green projects and assess their impact. Collaborative group workshops will challenge attendees to solve complex problems, such as constructing a sustainable investment portfolio or developing an anti-greenwashing policy. Interactive sessions, expert-led discussions, and peer-to-peer feedback are central to our approach, fostering a rich exchange of ideas and experiences. This blended learning model ensures a deep understanding of both the theoretical frameworks and the practical tools needed to excel in the field of sustainable finance, empowering participants with the confidence and competence to lead change within their organizations.

Course Agenda (Course Units):

Unit One: Foundations of Sustainable Finance and ESG Principles

- Introduction to Sustainable Finance and its evolution.
- Understanding Environmental, Social, and Governance (ESG) criteria.
- The link between ESG performance and financial performance.
- The role of the UN Sustainable Development Goals (SDGs) in finance.
- Key drivers of sustainable investing: risk, return, and impact.
- Global regulatory frameworks and reporting standards (e.g., TCFD, SASB).
- Identifying and mitigating the risks of greenwashing.

Unit Two: The Green Bond Market: Structure and Instruments

- History and growth of the green bond market.
- Defining green bonds and other sustainable debt instruments.
- Understanding the Green Bond Principles (GBP) by ICMA.
- The process of issuing a green bond from start to finish.
- The role of second-party opinion providers and verifiers.
- Analyzing different types of green bonds: corporate, municipal, and sovereign.
- Exploring other thematic bonds: social bonds, sustainability bonds, and blue bonds.

Unit three: Green Bond Investment Analysis and Valuation

- Frameworks for evaluating green bond investment opportunities.
- Integrating ESG factors into traditional credit risk analysis.
- Financial modeling for renewable energy and green infrastructure projects.
- Assessing the "greenium" and its implications for investors.
- Techniques for measuring the environmental impact of investments.
- Due diligence processes for green bond selection.
- Case studies in successful and unsuccessful green bond projects.

Unit Four: Developing and Implementing Sustainable Investment Strategies

- Building a sustainable investment policy statement.
- Strategies for ESG integration: screening, best-in-class, and thematic investing.
- Constructing and managing a green bond portfolio.
- Active vs. passive sustainable investment approaches.
- Shareholder engagement and proxy voting on ESG issues.
- Performance attribution for sustainable portfolios.
- Reporting on sustainability performance to clients and stakeholders.

Unit Five: Advanced Topics and Future of Sustainable Finance

- The emergence of transition finance for high-emitting sectors.
- Innovations in sustainable finance: sustainability-linked loans and bonds.
- The role of technology, AI, and big data in ESG analysis.
- Climate scenario analysis and stress testing for portfolios.
- Biodiversity finance and natural capital investing.
- The future of sustainable finance regulations and taxonomies.
- Developing a career path in sustainable finance.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

As sustainable finance evolves, how can investors and issuers balance the pursuit of financial returns with the authentic, measurable achievement of environmental and social impact, avoiding the pitfalls of 'greenwashing'?

What unique qualities does this course offer compared to other courses?

This course distinguishes itself by moving beyond theoretical concepts to provide a deeply practical and strategic immersion into the world of sustainable finance. While other programs may focus on definitions, our curriculum is built around the complete investment lifecycle, from identifying credible green projects and understanding the nuances of the issuance process to constructing and managing a high-performing sustainable portfolio. We emphasize the development of critical analytical skills, enabling participants to conduct rigorous due diligence, perform sophisticated risk assessments, and accurately measure non-financial impact. The content is forward-looking, addressing not just current market standards like the Green Bond Principles, but also emerging trends such as transition finance, blue bonds, and the integration of AI in ESG analysis. By focusing on real-world case studies and interactive financial modeling workshops, the course ensures that participants leave with actionable frameworks and a strategic mindset. This comprehensive, hands-on approach equips professionals not just to participate in the sustainable finance market, but to lead and innovate within it, making it an unparalleled learning experience for aspiring leaders in the field.