

CHARTERED 
INSTITUTE OF PROFESSIONAL CERTIFICATIONS

CHARTERED ESG INVESTMENT MANAGER™

CEIM™

**Fully Accredited
By:**

Chartered Institute of
Professional Certifications

CPD
Certification Service



PROGRAM OVERVIEW



A recent survey conducted by PwC's Global Investor team found that a staggering **79% of 325 top investors considered ESG** to be a significant factor in their investment decision-making, with **49% expressing a willingness to divest from companies that do not take meaningful action** on ESG issues. These findings highlight the growing importance of ESG in the investment community and the increasing pressure on investment managers to integrate these factors into their investment processes.

This Chartered ESG Investment Manager (CEIM™) program is a comprehensive certified program that will provide you with a thorough understanding of the **principles and framework behind ESG investing**, along with robust methods for identifying **climate risk, navigating ESG issues, and achieving your ESG investing goals**. You will learn how to effectively **analyze and integrate ESG factors into your investment decision-making processes**, helping you to identify companies with strong ESG practices and positioning you at the forefront of the rapidly growing sustainable investment industry. You will also gain insights into relevant **ESG risk metrics and learn how to measure and screen the impact of ESG investing on your overall investment portfolio** using materiality mapping. Additionally, this program will teach you how to incorporate the **ESG ecosystem into your internal controls** and prevent your organization from incurring regulatory penalties. You will then translate your organization's ESG and climate risk data into a report that can help you transition your investments into a Net-Zero portfolio over time.

By the end of the program and upon passing the Chartered exam, you will have earned the **Chartered ESG Investment Manager (CEIM™)** designation which you can use to demonstrate your professional credentials and track record in develop sustainable ESG investment strategies.

Globally demanded and recognized, this designation is an industry-recognized trademarked charter developed by the **Chartered Institute of Professional Certifications** and has lifelong validity. It's also fully accredited by CIPD (Chartered Institute of Personnel and Development), with 160,000 membership organizations worldwide.

ACCREDITATIONS



4.8



4.6



KEY SKILLS YOU WILL GAIN

From This Program



- ESG INVESTMENT STRATEGIES**
- ESG PRINCIPLES**
- ESG INVESTMENT OPTIMIZATION**
- SUSTAINABLE INVESTMENT FRAMEWORK**

- ESG RISK MANAGEMENT**
- ESG INVESTMENT PERFORMANCE MEASUREMENT**
- ESG RISK MITIGATION**
- ESG RISK MONITORING**

- ESG REPORTING**
- ESG IMPACT ASSESSMENT**
- ESG SCREENING**
- ESG INTEGRATED INVESTMENT**

- GREENWASHING ANALYSIS**
- ESG SCORECARD**
- SUSTAINABLE SUPPLY CHAIN ANALYSIS**
- ESG FINANCIAL ECOSYSTEM**
- ESG RATINGS**

- ESG STANDARDS**
- ESG FINANCIAL PERFORMANCE**
- ESG SCORES OPTIMIZATION**

YOUR FACULTY DIRECTOR



Navin Rauniar

Renowned ESG Advisory Partner, Speaker and Author

Navin Rauniar is a renowned ESG advisory partner, speaker, and author. As the former head of ESG, Climate & Sustainability at TATA, he was responsible for implementing ESG strategies for both financial and corporate clients. Navin is also the chair of the ESG/Climate Working Group at the Professional Risk Managers Association (PRMIA) and an expert on regulatory compliance for the sell and buy sides, including LIBOR, Basel, CRD, CRR, IFD, IFR, and CFTC regulations. In addition, Navin is a member of the TSVCN Consultation Working Group, where he works to drive the scaling and trading of high-integrity voluntary carbon markets with the goal of meeting the aspirations of the Paris Agreement. He is also actively involved in various influential financial bodies that address climate, ESG, and sustainable finance topics.

Navin is a **regular speaker and Chair** at **capital markets & risk management forums**, as well as a frequent commentator & author to the media on financial market regulations. He is a highly skilled & experienced professional who believes in going beyond responsibility and providing comprehensive and **industry-focused ESG program advisory** and assurance from development to execution.

OUR PARTICIPANTS

Over 70% of FORTUNE 500 Companies Have Attended Our Accredited Programs Before



Goldman Sachs



SAMSUNG



ExxonMobil



BURBERRY



citi



IKEA



VOLVO



HYUNDAI



Pfizer

Life is our life's work



Nestlé

PROGRAM AGENDA



MODULE 1 - INTRODUCTION TO ESG

- What is 'E', 'S' and 'G'?
- Explaining climate risk, sustainable finance, GHG and net zero
- ESG opportunities and challenges
- Global regulatory requirements for ESG frameworks including climate, sustainability, carbon & net zero
- Sustainability including SFDR & CSRD
- The 'E' taxonomies

MODULE 2 - SUSTAINABLE INVESTMENTS

- Introduction to green & transition bonds, green & sustainable loans, and green derivatives
- Approaches for integrating ESG into the portfolio management process and linkage to product frameworks
- Product frameworks for climate financing - AFME, ICMA, CBI, LMA, LSTA, APLMA & ISDA
- "Green-washing", "social-washing" & the imperative to conduct risk

MODULE 3 - ESG INVESTMENT FUNDAMENTALS

- ESG integration & adoption into the management of an investment portfolio

- Distinction between screening of individual companies and collective investment
- Adoption of ESG impacts and approaches
- Active vs passive portfolio management

MODULE 4 - ESG RISK MANAGEMENT

- Approaches for identifying ESG risks in the trading & banking book
- Analysis of each E, S, and G factors using transition risk analysis
- Mapping to green & social taxonomies and applying the GAR & BTAR ratios
- Modelling ESG risks using sustainability, physical, carbon & temperature methodologies
- Basel ESG risks applied to credit, market, and operational risks

MODULE 5 - ESG INVESTMENT STRATEGIES

- Exclusionary vs positive screening - Is exclusionary screening the same as 'cancel' culture?
- Supply chain analysis by major industry – Scope 1 vs 2 vs 3
- Does screening enhance 'asset allocation'?
- Is positive screening only practical for dedicated portfolios?

PROGRAM AGENDA



- Full integration - Higher returns with lower ESG risk?
- Prediction of timing and frequency of ESG events

MODULE 6 - ESG FINANCIAL ECOSYSTEM

- Screening approaches
- Active vs Passive management
- ESG integration in the portfolio

MODULE 7 - ESG ASSESSMENTS AND FRAMEWORKS

- Green financial KPI to drive ESG
- Using carbon markets to drive ESG & green KPI
- Impacts of metrics on the ESG transition & considerations for credit risk

MODULE 8 - ESG & FINANCIAL PERFORMANCE

- Portfolio screening
- Utilizing portfolio methodologies
- Understanding carbon scope 1, 2 & 3 in the portfolio

MODULE 9 - ESG DATA AND REPORTING

- Impact investing & active ownership via stewardship
- Stewardship methods
- Engagement of the "buy side" and the challenges

MODULE 10 - HOW TO IMPROVE ESG SCORES

- Recap on ESG data
- How ESG scoring is being created
- Applying impacts in ESG scoring

EXAMINATION

YOUR CHARTER DESIGNATION



Chartered Institute of Professional Certification's programs are unique as they provide you with professional charter designation and mark that can be used across your lifetime once you have completed our programs.

After completing the program and passing the Chartered exam, you will be awarded the **Chartered ESG Investment Manager (CEIM™)** designation that can be used in your resume, CV and other professional credentials. This designation is a global trademark and industry-recognized with lifelong validity.

Globally demanded and recognized, this designation will help you distinguish your sanctions compliance skillsets and demonstrate that you have attained expertise in effective ESG investment.

ABOUT US

49,525

Business Leaders Have
Attained Their Chartered
Certifications Since 2009

390

Certified and Fully
Accredited Programs

87%

Chartered Leaders Have
Reported Career Promotions
and Enhancements

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All of Chartered Institute of Professional Certifications programs are fully accredited programs. The professional charter and designations are trademarked credentials that can only be used by professionals who have completed and passed our accredited program. It is also independently accredited by CPD as adhering to the highest standards of continuing professional principles.

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CONTACT US TODAY

We Thank You for Your Ongoing Support
of Our Programs

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