

Sustainable Investing

5-08-2024 – 12-08-2024

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Saturday and Sunday 3 and 4 August 2024		
Time	Activity	Description
12:00-18:00	Key pick up	You will find the exact key pick up location in the pre-departure information, which becomes available after you have paid the course fee.

DAY 1: Monday 5 August 2024		
Time	Activity	Description
9:00-09:30	Welcome and Campus tour	
09:30-12:30	Meet & greet Introduction to Sustainable Investing	<p>Definition of sustainable investing and its significance in the financial industry. Historical background and evolution of sustainable investing. The role of environmental, social, and governance (ESG) criteria.</p> <p>Principles and Approaches: Different approaches to sustainable investing, such as ESG integration, impact investing, and ethical investing.</p> <p>Principles and frameworks, including the UN Principles for Responsible Investment (PRI). ESG Analysis and Data: Understanding ESG factors and how they affect investments. Sources of ESG data and analysis methods. The development of ESG risk, scores and ratings.</p>
12:30-13:30	Lunch*	
13:30-15:30	Start of the group assignment	
15.30-17.00	wrap up/summary	Summary of the day, feedback from and to the groups, outlook for tomorrow

DAY 2: Tuesday 6 August 2024		
Time	Activity	Description
9:00-12:30	<p>Sustainable Investment Strategies</p> <p>Guest lectures APG Asset Management: Nina Hodzic</p> <p>Fiduciary Manager Responsible Investment</p> <p>and</p> <p>Robert-Jan Prins</p> <p>Fiduciary Manager Responsible Investment (SFDR)</p>	<ul style="list-style-type: none"> • An introduction to the Legal Framework • Regional and International regulations: <ul style="list-style-type: none"> ○ Sustainable Finance Disclosures Regulation (2.0) ○ EU Taxonomy ○ CSRD ○ MiFID II • Compliance and fiduciary duties. • Reporting requirements and disclosure. <p>Responsible Investment Approaches in practice:</p> <ul style="list-style-type: none"> • Negative screening and exclusion criteria <ul style="list-style-type: none"> ○ Ethical and other considerations ○ Addressing ethical dilemmas and conflicts of interest. ○ Aligning investments with personal values and beliefs. • Positive selection / Best-in-class strategies • Integration of ESG into traditional financial analysis • Active Ownership: Engagement and Voting

For more information about the Social Programme, please visit the [Utrecht Summer School website!](#)

		<ul style="list-style-type: none"> • Thematic / SDG Investing • Impact Investing. <p>Investment Products and Instruments:</p> <ul style="list-style-type: none"> • Sustainable mutual funds and ETFs • Green bonds and social impact bonds. • Direct investments in sustainable companies or projects.
12:30-13:30	Lunch*	
13:30-15:30	Continuation of the group assignment	
15:30-17:00	Wrap up/summary	Summary of the day, feedback from and to the groups, outlook for tomorrow

DAY 3: Wednesday 7 August 2024		
Time	Activity	Description
8:30-12:30	Visiting and opening the Amsterdam stock exchange	See this link: Amsterdam Exchange Experience euronext.com
12:30-13:30	Lunch*	Back in Utrecht
14:00-16:30	Risk, return, costs and performance	<p>Risk and Return Considerations: Analyzing the potential impact of ESG factors on risk and returns. Evidence of the financial performance of sustainable investments. Market trends and correlations between ESG and financial performance.</p> <p>Various cases: Analyzing real-world examples of successful sustainable investments. Examining challenges and failures in the field.</p> <p>The role of ESG investing in Portfolio Management: Building a sustainable investment portfolio. Asset allocation and diversification. Rebalancing and ongoing monitoring. Emerging ESG investment trends and Future Outlook: Current investment theories and trends in sustainable investing. Innovations and potential developments in the field.</p>
16:30-17:00	Wrap up/summary	Summary of the day, feedback from and to the groups, outlook for tomorrow

DAY 4: Thursday 8 August 2024		
Time	Activity	Description
9.00-12:30	Guest lecture (Goodwell Investments) Nico Blaauw (managing partner)	<p><i>Purpose into practice. What when the goings get tough?</i></p> <p><i>The global financial sector is at a crossroads where more and more people and institutions understand that our financial choices significantly impact not only our personal futures but the future of our planet. But what happens when the financial going gets tough? When markets are volatile, and returns are uncertain? These, and many other challenges test the very essence of values-driven investment strategies. Goodwell looks at real-world examples and mr. Blaauw will use their Goodwell experiences and investment mantra and strategy to address how they tackle potential conflicts of interest and build resilience. Ultimately, sustainable investing should not just be a fair-weather strategy but a robust, enduring approach that can withstand and thrive even in the most challenging financial climates.</i></p>
12:30-13:30	Lunch*	
13:30-15:30	Continuation of the group assignment	
15.30-17:00	Wrap up/summary	Summary of the day, feedback from and to the groups, outlook for tomorrow

Friday, 09-08-2024		
Time	Activity	Description
10:00-12:30	<i>Finalization of the group assignment and start of the final presentations</i>	
12:30-13:30	<i>Lunch*</i>	
13:30-15:30	<i>Continuation of the final presentations</i>	<i>Presentations</i>
15:30-17:30	<i>Saying goodbye</i>	<i>Drinks at The Grand Living</i>

*Please note: Students must bring/cover their own lunch
The lunch times in the programme can vary, these times are just an indication.