

ESG and sustainability in private equity

Training Program – Module 8

Date

Wednesday, 21 June 2023
13:00-17:00

Venue

Online

Speakers

- Christina Böck, Partner, Indefi
- Emmanuel Parmentier, Partner, Indefi

Targeted public

- Investment professionals in private equity firms
- Investment professionals in fund investment firms
- Professionals in charge of product development and fundraising
- Dedicated ESG teams

Requirements

Participants are expected to know fundamentals of private equity and advised to follow “Private equity in a nutshell”.

Language

English

Program

ESG and sustainability in private equity

Objectives

- Understand what ESG and sustainability are about in the context of private equity
- Get an overview of the most important ESG methodologies adapted to private equity
- Understand the evolution of regulations in sustainable finance in Switzerland and Europe
- Understand the implications of an ESG policy on investment processes and interactions with both portfolio companies and fund investors

Description

This training session will provide trainees with an overview of the key elements related to ESG and sustainability. Demands from fund investors and ever-increasing soft and hard regulations lead PE firms to address environmental, social and governance risks in private investments. Insights will be given on how to design a coherent ESG framework from the sustainability philosophy down to the investment process.

Agenda

Introduction: What ESG is about in private equity?

- ESG, sustainability, impact, CSR.... What are the differences and which concepts apply to private equity?
- E, S and G: What are the topics and what risks are considered
- The current state of play
- Fund investors' expectations today

ESG methodologies

- Mandatory policies and commitments when launching a new fund
- ESG integration throughout the investment process: exclusions, due diligence, monitoring of portfolio companies, exit
- Pros and cons
- What is needed for the implementation of ESG and sustainability?

Regulation around sustainability

- The Swiss context
- Regulation for the different stakeholders: Portfolio companies, PE firms, fund investors, distributors
- European regulation around the three pillars of SFDR, Taxonomy, and CSRD

How to implement a relevant ESG strategy

- How to define a new ESG Policy
- How to translate the Sustainable Investment policy into real-life investment processes
- How to re-design the relationship with portfolio companies and create value through ESG
- How to communicate with fund investors