

## ESG REPORTING FOR BANKS AND FINANCIAL INSTITUTIONS



CLARISSE SIMONEK



Monday - Tuesday  
May 8-9, 2023



8 AM to 2 PM



RO 630/- per participant  
(Including VAT)



CBFS, Boshar Hall

## Key Learning Objectives

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

- Understand the key drivers of ESG reporting
- Master the principles of an effective ESG reporting
- Contribute to the design and decision process around ESG reporting
- Discuss the most appropriate process and governance to secure adequate ESG reporting
- identify gaps and weaknesses as well as key risks in ESG reporting
- Prepare for future regulatory and market requirements on ESG reporting

## Contents Highlights:

- Introduction, course objectives and participant expectations.
- “Why ESG reporting is becoming a critical part of disclosure?” The double materiality concept.
- Environmental, Social and Governance factors. Definition, institutional and regulatory background, measurement and KPIs. Making sense of the ESG data and information from a strategic perspective.
- Climate risk. Understand why regulators are increasingly requiring detailed monitoring and reporting of the risk climate. Terminology and case studies of physical and transition climate risk.
- ESG Reporting standards, from Basel Committee Pillar III guidelines to the newly established International Sustainability Standards Board. How advanced regulations are dealing with the ESG agenda (the example of the EU regulation). Regional trends. Case Study.
- TCFD reporting principles and structure. The four parts of the disclosure requirements: Governance, Strategy, Risk Management, Metrics and Targets. Case Study.
- From principles to action. Design and structure of an ESG report. How to set up the right governance and assurance around ESG reporting, roles and responsibilities, implementation challenges.
- The way forward on ESG reporting. Regulatory trends and market practice. The growing risks of greenwashing and ESG fraud, and how to mitigate those risks. Case study.

## About the Speaker:

**Clarisse Simonek** specializes in responsible investment, with both executive and non-executive experience. She has worked for asset owners, fund managers, social enterprises, and universities across Europe and the Americas. By bridging academia and practice she is able to deliver ambitious yet pragmatic change. Clarisse sits on the UK Prosperity Fund’s Brazil Green Finance Innovation Committee and S&P’s Global Sustainable Finance Scientific Council and chairs the Board of Trustees of an entrepreneurship charity. She is the academic advisor of the CFA’s ESG Investing certification and contributes to academic programs for University of Cambridge and ESSEC Paris-Singapore. She holds a joint MBA-MSc on sustainability from HEC Paris / FGV and CFA certification.



**For registrations and enquiries, please contact:**

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