

# Implementing an ESG framework in private equity

Training Program – Module 8

## Date

Tuesday, 4 June 2024  
09:00 – 13:00

## Venue

Online

## Speakers

- 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

### Implementing an ESG framework 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