

Introduction to sustainability in private equity

Training Program – Module 8

Date

Wednesday, 11 June 2025, 09:00-13:00

Venue

Online

Speakers

- Emmanuel Parmentier, Indefi
- Claudia Campisi, 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

Introduction to sustainability in private equity

Objectives

- Understand the drivers of sustainability and ESG in the sphere of private equity
- Understand the evolution of sustainable finance regulation in Europe
- Understand the role of sustainability in driving long-term value creation and protection
- Understand how sustainability is integrated into (i) the investment process and (ii) interactions with portfolio companies and fund investors through practical cases

Description

This training session will provide trainees with an overview of the key elements related to sustainable finance (i.e., 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. Through practical cases and examples, insights will be given on how to deploy sustainability throughout the investment cycle. The training will end with an emphasis on two key themes for private equity players: (i) the detection of sustainable vs. vulnerable assets and (ii) climate strategies.

Agenda

Introduction: What is sustainable finance and how does it apply to 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?
- What are the key drivers of sustainable finance?
- Fund investors' expectations today

Sustainability regulations: implications for private equity players and portfolio companies

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

Implementing sustainability throughout the investment cycle

- How to define a sustainability strategy and policy
- How to integrate the sustainability policy into the investment process: exclusions, due diligence, monitoring of portfolio companies, exit
- How to re-design the relationship with portfolio companies and create value through sustainability
- How to report on portfolio sustainability performance to inform fund investors and regulators

Deep dives on two key sustainable finance challenges

- Portfolio analysis: understanding the difference between sustainable and vulnerable assets
- A must-have: climate change strategies