

Understanding and comparing ESG rating methodologies from industry leaders

A virtual classroom to know more about how leaders in the ESG rating industry are assessing ESG risks and opportunities.

Academy
12 May 2022



EURONEXT

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Academy

At the Academy we aim for raising global **capital markets expertise** by delivering world-class training courses and programmes.

Our programmes reflect the evolution and trends of **financial markets and their eco-systems** as well as best practice knowledge, skills and behaviours.

Key assets of our learning capability are our central position within global capital markets, and our **internal and external expert faculty**, whose contributors are drawn from practitioners, academics, advisors and financial market specialists.

As an Exchange system, being at the centre of financial markets, we understand not just what happens now, but also what's changing - so we can design our courses to equip you for the world of today and tomorrow.

An accredited Management System Certificate

Academy meets the management system standards UNI EN ISO 9001:2015, sector EA:37 since 2007.

The accreditation guarantees internationally recognised quality service standards and allows companies to apply for public funding to finance individual and company training projects.





Course overview, objectives and target

Overview

Course overview and objectives

ESG Ratings are designed to help investors understand ESG risks and opportunities and integrate ESG factors into their portfolio construction and management processes.

Long-term risk and return profile of institutional portfolios can be impacted by a number of ESG factors, from natural resource scarcity to changing governance standards, from global workforce management to the evolving regulatory landscape.

In this context, promoting globally consistent standards for assessing ESG risks and opportunities is the current challenge of regulators and ESG rating agencies, but one of the key ways to truly impact on portfolios alignment to net-zero.

Objectives and key take aways

Key take aways

By reviewing their current ESG rating methodologies, leaders in the ESG rating industry will provide a thorough understanding of what “materiality” would look like in the assessment of ESG risks and opportunities, thus helping **investors**:

- understand financially material ESG risks in their portfolio companies and how those risks might affect performance.
- identify those companies that are leading or lagging in their industry,
- improve their risk management and engagement processes,
- refine their portfolio and **index-based products** construction.

The highlighted assessment methodologies will also help **corporates** identify

- financially material ESG risks and opportunities
- valid sources of information to help internal advocates promote change, as well as highlighting areas of particular weakness and strength
- focus on the most relevant changes to their ESG strategy and disclosures approach

Who should attend

Target audience

The course is designed to the benefit of a diversified audience

- Asset and portfolio managers
- Responsible investors
- Fund managers
- Asset owners

In asset management firms

As well as

- IR and ESG managers
- Risk managers
- Board members

of listed companies

Faculty

Our Experts

Stefan Schnell

Member

EFRAG Sustainability Reporting Board

Emilie Beral

Head of Methodology

MOODYS

Claudia Volk

Senior Vice President of Methodology and Portfolio Research

Sustainalytics

Manjit Jus

Head of ESG Research

S&P Global

Sara Lovisolo

Head of Group ESG

Euronext Group

Agenda

Understanding and comparing ESG rating methodologies

12 May 2022

14.00 CET - Registration and Introduction

14.15 – Understanding taxonomy and what that really means for investors

Sara Lovisolo
Head of Group ESG
Euronext Group

14.45 - Advancing global standards for sustainability reporting

Stefan Schnell
Member
EFRAG Sustainability Reporting Board

Learn from the industry leaders:
global index, data and analytics providers

15.15 - Understanding rating criteria from industry leaders

- Identifying materiality in industry-specific ESG risks
- Unveiling the methodology
 - Collection of issuers data
 - Peer Review
 - Scoring ESG management frameworks
 - Assessing and measuring Corporate governance frameworks
 - In-depth company engagement
 - Alignment with Sustainable Development Goals
- Measuring climate related initiatives

Speakers:

Emilie Beral
Head of Methodology
MOODYS

Claudia Volk
Senior Vice President of Methodology and Portfolio Research
Sustainalytics

Manjit Jus
Head of ESG Research
S&P Global

Chairwoman:

Sara Lovisolo
Head of Group ESG
Euronext Group

16.00 - 16.15 am **Coffee break**

17.30 Closing remarks

Terms and conditions

The registration form is a legally binding agreement between BIIt Market Services and the applicant (or the company the applicant works for) and is defined by the following conditions:

Virtual classroom schedule

12 May 2022: 14:00 – 17:30 CET

Registration

The applicant can submit the registration form, duly filled out, to Academy 7 days prior to the course date via:

- **EMAIL** academy@euronext.com
- **WEB** [Academy website](#)

To register after this date, please contact the following phone number:

- **TEL +39 02 72426 086**

Participation will be confirmed in writing by the Academy administration.

Registration fee

The individual registration fee to the course is **€ 490 + 22% VAT** (if applicable).

The fee includes the course materials in pdf format.

Discounts

Multiple registrations - Discounts are available for multiple registrations of the same company. In particular:

- Two participants: 10% discount on the total amount
- Three participants: 15% discount on the total amount
- Four or more participants: 18% discount on the total amount

Payment method

Fees must be paid:

- Upon receipt of the email from Academy confirming the applicant's registration (sent approximately 7 days prior to the course date)

or

- Upon receipt of the invoice from BIIt Market Services S.p.A. (Academy is part of the BIIt Market Services Company)

Payment must be made via BANK TRANSFER to:

BIT MARKET SERVICES S.p.A.

P.zza degli Affari, 6

20123 Milano

Tax code 06695270964

VAT number 10977060960

Deutsche Bank S.p.A.

Filiale via San Prospero, 2

20121 Milano

codice IBAN:

IT 22 B 03104 01600 000000 770114

SWIFT address DEUTITMMIL

Copy of the effected bank transfer must be emailed to Academy academy@euronext.com.

Invoice marked as paid will be mailed to the addresses indicated on the wire transfer.

Intellectual property rights

The Client acknowledges and agrees that the contents made available during the training (including, but not limited to, videos, pictures and texts) are property of BIIt Market Services or are supplied by BIIt Market Services in virtue of certain contractual arrangements with third parties and cannot be reproduced, distributed or used for business purposes without the prior written consent of BIIt Market Services or the entity having the relevant rights on the same.

Liability

Whilst every effort is made by BIIt Market Services to ensure that the contents of the training (including, but not limited to, videos, pictures and texts) are accurate and up

to date, BIt Market Services shall not be liable whatsoever for any inaccuracy or misleading information, nor for any consequential damage or expense or any loss of profit or any liability to third parties incurred as a result of reliance on such information, which is provided for educational purpose only. BIt Market Services total liability under this agreement shall be limited to the maximum amount represented by the Fees paid to the latter by the Client.

Traceability of financial flows

BIt Market Services and the Client assume all obligations regarding the traceability of the financial flows provided by Law 136/2010, as subsequently amended and implemented (the "Traceability Obligations").

In relation to the payments to be made pursuant to the present Contract, the Client, if it is a public contractor pursuant to decree law 163/2006 (Code of public contracts for works, services and supplies), to ensure the enforcement of Law 136/2010 and subsequent amendments, undertakes to communicate to BIt Market Services, by the form attached to the Contract, the identification bidding code (CIG) and, in case, the unique code of project (CUP).

In particular, in fulfilling the Traceability Obligations, BIt Market Services will communicate to the Client:

- (i) the bank accounts details to be used, also nonexclusively, for the payments to be made by the Client pursuant to the present Contract;
- (ii) the personal details and the fiscal code of the persons delegated to operate on them, indicating the relevant role and powers, within 7 (seven) days from the creation of the accounts above (or, in case of existing accounts, within 7 (seven) days from their first use in relation to the payments made by the Client).
- (iii) Any possible amendment of the information indicated in points (i) and (ii) above, will have to be communicated by the Client within 7 (seven) days from occurrence.

Let it be understood that, save for possible derogations and partial exemptions to Law 136/2010, failure to use instruments suitable to permit the full traceability of the financial flows (for instance, bank or post transfer) and

the failure to comply with any other Traceability Obligations, are ground to terminate the present Contract.

BIt Market Services undertakes, in particular, to inform the Client and the Prefecture (territorial office of the Government of the province where the Client has its registered office) if it becomes aware of breaches by its contractual counterparties, if any, in relation to the Traceability Obligations.

Cancellation Policy

According to article 1373 C.C., to withdraw from this contract applicants must send a written notice via email to academy@euronext.com:

- The fee will be fully refundable up to 7 working days prior to course date.
- A 50% refund will be provided for cancellations made during the 6 days leading to the course,
- Fees are non refundable for cancellations made 1 day prior to the course date.

Substitution of attendee (from the same company) may be made at any time.

Academy accepts requests to replace the course with another Academy course. The rescheduled training must take place within 12 months.

Changes to the program

BIt Market Services reserves the right to postpone or cancel the course and notify the participant via fax or email at least 1 week before the course date; in this case, the participant is entitled only to a full refund of the course fee. In addition, BIt Market Services is entitled to make changes to the programme and seat of the training and/or substitute the expected panellists with others with equal skills and competence.

Governing law and jurisdiction

The present agreement shall be governed by Italian law. The parties assign to the Court of Milan the exclusive jurisdiction over any dispute arising out the present agreement, this including – but not limited to – any proceedings regarding the validity, the construction, the performance and/ or the termination of the agreement.

Booking form

Please read the terms and conditions on the preceding page.

Fill out the form and send email to academy@euronext.com.

For further information +39 02 72426086 – academy@euronext.com

Understanding and comparing ESG rating methodologies from industry leaders

Virtual Classroom – 12 May 2022

COURSE FEE

Individual		<input type="checkbox"/> € 490 + 22% VAT (if applicable)
2 participants	10% discount	<input type="checkbox"/> € 882 + 22% VAT (if applicable)
3 participants	15% discount	<input type="checkbox"/> € 1,249 + 22% VAT (if applicable)
4 participants +	18% discount	<input type="checkbox"/> € + 22% VAT (if applicable)

PARTICIPANT INFORMATION

Name and Surname

Jop title

Company

Email

Phone

Job Field

General Management

ICT

Tax

Knowledge level of the subject

Basic

HR, Organisation and Development

Legal

Finance

Intermediate

Administration and Control

R&D

Risk Management

Advanced

Nature of business

Listed/unlisted company

Bank

Advisory

Energy

Lawyer

Investment Bank

Private Equity

Funds

Company Address

Street

N.

Zip code

City

Country

BILLING INFORMATION

The invoice must be addressed to:

Company name/Participant name and surname

VAT number

Department

Billing reference name

Street

N.

Zip code

City

Country

Phone

Email

ELECTRONIC INVOICE (IF APPLICABLE)

According to the Italian Law no. 205 of 27.12.2017 and to Provision no. 89757 of 30.4.2018 of the Italian TAX Authority and subsequent amendment and/or integrations, the Client duly holder of an Italian VAT code/Tax identification code) provides with:

Certified Email Address (PEC):

Or Recipient Code:

In order to receive the electronic invoice through the Italian Exchange System (SDI) according to the above information

Phone

Email

SPLIT PAYMENT (IF APPLICABLE)

According to the art. 17-ter of the Italian D.P.R. no. 633/72 (as subsequently amended and implemented), the Client (duly holder of an Italian VAT code/Tax identification code) declares that:

is subject to the "Split Payment" VAT regime is not subject to the "Split Payment" VAT regime

and undertakes to communicate any change of such regime.

PRIVACY

By signing this booking form I declare that I have read the informative document regarding the processing of personal data on the Bit Market Services S.p.A.'s website (<http://www.borsaitaliana.it/varie/privacy-bims/privacy-bims.en.htm>) and I accept the General Terms and Conditions of the service.

In addition to the declaration above, by ticking the relevant box I also inform that (*please tick the chosen box*):

I DO

I DO NOT

authorize Bit Market Services S.p.A. to gather and to process my personal data for the purpose of "direct marketing", by sending advertising material, direct sales and promotion of products and services of Bit Market Services S.p.A., carrying out market research, marketing communications, also using data subject's name for publicity carried out through automated means of contact such as e-mail, fax messages, mms or sms.

I DO

I DO NOT

authorize the communication/the transfer of the personal data for the purposes of direct marketing by third parties - even outside the European Community - included the other companies of the Euronext Group, as well as third parties referred to in point c) of the informative document regarding the processing of personal data (<http://www.borsaitaliana.it/varie/privacy-bims/privacy-bims.en.htm>).

Signature and company seal

Date:

Academy

Comprehensive, quality education is fundamental for the development and growth of the economy. As part of a leading pan-European market infrastructure at the centre of European capital markets, Academy's main objective and activity is turning capital markets expertise into world-class training courses and programmes and making them relevant to the wider financial community of today and of tomorrow. Key Academy assets are our centrality in capital markets, and our internal and external faculty, made up of practitioners, academics, advisors and financial market specialists. Interactive and innovative learning methods make all Academy programmes an inspiring experience.

CONTACTS

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+39 02 72426 086



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