

Registration & coffee

08:30 - 09:00

Chair's welcome

09:00 - 09:10

How global disclosures are shaping investment opportunities

09:10 - 09:55

- How disclosures are being embedded into the investment decision making process
- Steps that users and preparers are taking to manage greenwashing risk
- Increasing the interoperability of reporting frameworks
- Assessing the prevalence of voluntary reporting as mandatory requirements grow
- Ensuring corporate competitiveness through disclosures
- Using disclosures to increase the availability of finance
- Utilising disclosures to further galvanise corporate action
- Exploring whether we have sufficient data availability and quality to enhance reports
- How firms are we providing assurance
- Ongoing thinking around measurement and disclosure to benchmark progress

Participants

Richard Burrett - Chief Sustainability Officer, Earth Capital

Balancing fiduciary responsibility against ESG performance

09:55 - 10:40

- Exploring the purpose of a sustainable investment strategy
- How funds are considering material risks and financial materiality
 - Incorporating sustainable investment themes with a reduced financial link
- Assessing the current end-investor and asset owner expectations
- Considering the viability of biodiversity as a viable investment strategy
 - The potential for greater regulatory intervention to enhance investment
- Gauging the limits of investors
- How investors are meeting asset owner reporting expectations
- Moving from retrospective reporting to forward-looking investing
- The extent that investors are focusing on emerging markets to achieve impact
- Changing focus from small impactful investments to more thematic/integrated investing
- Gaining greater data and insights
- How do we view the current progress achieved?

Participants

Roman Cassini - Head of ESG, Hosking Partners

Networking break

10:40 - 11:10

Prioritising data methodologies as much as data outputs

11:10 - 11:55

- Who is using data reporting by financial institutions?
- Reducing the risk of over-reliance on data outputs over methodologies
- Striking the balance between quantity and quality of information
 - Ensuring granularity isn't at the cost of financial materiality
- The correct usage of metrics and measurement benchmarking tools
- Gaining greater proliferation and insights from forward-looking data
- How clients are integrating data into their frameworks
- Reducing areas of conflict within standards and policy
- How current datasets are providing alpha signals
 - How data can better help facilitate capital into impactful areas

Participants

Alpesh Doshi - Managing Partner, Redcliffe Capital

Sergio Henrique Collaco de Carvalho - Head of Impact, Planet First Partners

Alfred Sandeman - ESG Analyst, Candriam

Vincent Lecat - Head of Impact and ESG, Development Partners International

How regulatory development is impacting the transition

11:55 - 12:40

- Areas of policy development to enable the transition to a low carbon economy
 - Enhancing interoperability
 - Should 'transition' be a separate label within major global regulatory initiatives?
 - How global transition taxonomies are affecting investment strategies
- How investors are measuring success within transition finance and investing
- How clients are measuring success within transition finance and investing
- Managing fiduciary duty alongside climate goals
- The role of public finances within enabling the transition
- Outlining our realistic expectations for what transitions plans will achieve

Participants

Martin Frandsen - Portfolio Manager, Principal Asset Management

Cornelia Frenzt - Director of Governance & Sustainable Investing, European Circular Bioeconomy Fund

Lunch break

12:40 - 13:40

SFDR & SDR: Redefining fund types as the market matures

13:40 - 14:25

- How funds are measuring performance to aid market understanding
 - Aiding investor understanding as the market matures
- Exploring existing portfolio construction under SFDR
 - How the ongoing consultation might change this
- Whether existing regulation is aiding or abetting transition investing
- How SFDR has impacted the usability of funds for investors
 - What did the migration of article 9 products into article 8 mean for investor clarity?
- How funds are managing the potential for greenwashing or greenhushing
- Charting the ongoing resource required to meet regulatory requirements
- Outlining future areas where greater interoperability can be achieved

Participants

Seb Beloe - Partner, Head of Research, WHEB Asset Management

Reporting for CSRD & ESRS

14:25 - 14:55

- Building initial capabilities to meet CSRD reporting requirements
 - Completing a gap analysis to understand areas of improvement
- How firms have been completing their double materiality assessment
- Reviewing disclosure templates
- How CSRD reports are being produced alongside sustainability statements
- Building a data strategy to provide holistic insight
 - Exploring methodologies around financial quantification
 - Creating a data collation and management strategy
- Ensuring interoperability of data with CDP and GRI through streamlining operations
- Gaining insight into the value chain
- Getting the correct data mix between proprietary and third party data

Working to increase regulatory convergence & interoperability

14:55 - 15:40

- Managing regulatory requirements across multiple jurisdictions
- Mapping the current areas of overlap
- Where we are seeing conflict in regulatory frameworks
- How regulation could be further shaped to serve investment opportunities
- Mapping the ongoing resource requirements

Afternoon break

15:40 - 16:10

The opportunity within private markets to enhance global sustainability

16:10 - 16:55

- Exploring stewardship and support of portfolio companies to enhance sustainability
- The current benchmark for available and actionable ESG data
 - Whether CSRD will provide structured insights of too much data
 - Current harmonisation within existing datasets
- How investors are incorporating ESG risks within investment due diligence
- How sustainability goals are affecting manager selection
- Manager selection
- Due diligence
- Private equity & credit

Participants

Claire Hedley - ESG Director, 17Capital

Using standards and guidelines to set a baseline within fixed income

16:55 - 17:40

- The role of investors and financiers in creating more green projects
 - Working with issuers to structure their projects around sustainability aims
 - Increasing the focus on projects outside of climate
- Assessing the limitations of voluntary standards
- Outlining expectations for the impact of the EU GBS
 - How it may affect the prevalence of green projects
 - Will it create new projects that wouldn't have previously existed?
- Exploring whether data is in a suitable place to support regulatory initiatives
- How investors are shaping products in line with regulatory requirements
 - Metrics and measurement to determine progress
- How the threat of greenwashing risk is shaping issuance

Participants

Jo Richardson - Head of Portfolio Strategy, Anthropocene Fixed Income

Evening drinks reception & networking

17:40 - 18:40

SCHEDULE

SFR EUROPE: ESG REGULATION, DATA & TCFD REPORTING -
15/10/2024

SFR Europe: ESG Regulation, Data and TCFD
Reporting

15th October 2024

London

TIME	
08:00	08:30 - Registration & coffee
09:00	09:00 - Chair's welcome 09:10 - How global disclosures are shaping investment opportunities 09:55 - Balancing fiduciary responsibility against ESG performance
10:00	10:40 - Networking break
11:00	11:10 - Prioritising data methodologies as much as data outputs 11:55 - How regulatory development is impacting the transition
12:00	12:40 - Lunch break
13:00	13:40 - SFDR & SDR: Redefining fund types as the market matures
14:00	14:25 - Reporting for CSRD & ESRS 14:55 - Working to increase regulatory convergence & interoperability
15:00	15:40 - Afternoon break
16:00	16:10 - The opportunity within private markets to enhance global sustainability 16:55 - Using standards and guidelines to set a baseline within fixed income
17:00	17:40 - Evening drinks reception & networking