

IMPACT INVESTING MASTERCLASS FOR
INSTITUTIONAL INVESTORS

HOW TO INVEST WITH POSITIVE IMPACT

*7 STEPS TO BUILD A VALUES-
CONSISTENT PORTFOLIO*

HOSTED BY

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HOW TO INVEST WITH POSITIVE IMPACT

7 STEPS TO BUILD A VALUES-CONSISTENT PORTFOLIO

This masterclass aims to equip participants with the skills to translate clearly defined objectives from a Theory of Change (ToC) into actionable targets for implementation and portfolio construction. Participants will dive into the process of developing, refining, and operationalizing a ToC specifically for investment purposes.

We will cover the measurement of change and the establishment of a robust system of key performance indicators (KPIs) to track and assess impact goals in investments. For the final exercise on impact fund selection and portfolio design, participants will use Phenix Impact Fund Database - an exclusive in-house sourcing tool designed for professional investors - to complete a mock-up portfolio.

SPEAKERS



CAROL TARR

Head of Impact Programs & Collaborations

PHENIX CAPITAL GROUP



FALKO PAETZOLD

Managing Director

CENTER FOR SUSTAINABLE FINANCE AND PRIVATE WEALTH



HETAL DAMANI

Impact Partner

TRILL IMPACT



KEY TAKEAWAYS



Understand portfolio construction that reflects your values and fulfils the demands of your Impact mandate while maintaining financial returns.



Develop a financial-first Impact Investing method with a rigorous system of KPIs for actively seeking to create positive change on people and the planet while achieving financial returns.



Harness an understanding of the significance of a Theory of Change (ToC) and its connection to developing a robust impact investment thesis centered on outputs, outcomes, and impact. Operationalise the ToC to construct an impact investing portfolio.



Gain hands-on experience in setting parameters for comparing finance-first impact funds through exclusive access to proprietary sourcing tool containing 2600+ vetted impact funds.



Gain exposure to and recognize different asset managers' implementation strategies via real-world examples and case studies on how they have integrated and operationalized their values into their portfolios and impact measurement systems.

SCHEDULE

14 November 2024, Zurich

12h00 Registration and welcome lunch

12h30 Session 1

- Actionable theory presentation
- Values in action case-studies

14h30 Coffee Break

14h45 Session 2

- Investing for System Change
- Group assignment

15h45 Networking closing drinks



WHY IMPACT INVESTING

The world is facing an abundance of environmental and societal challenges. Recent years have seen significant momentum surrounding the need of a 'new normal' where financial markets are designed to positively contribute to sustainable development while still realising financial returns. Despite this trend, significantly more private sector capital is needed to help finance the implementation of the 2030 Agenda, which requires investments in the amount of several trillion USD each year. Phenix Capital Group accompanies institutional investors and asset owners throughout their impact journey, from values alignment and developing a Theory of Change through fund selection, measuring and management (IMM) and reporting. We provide tools to facilitate the implementation of a successful impact investing mandate.

ABOUT THE ACADEMY

This masterclass is hosted by Phenix Impact Investing Academy offering a series of executive educational courses and masterclasses tailored to the needs of institutional investors around the globe. The Academy provides in-depth sessions on the latest topics in impact investing, featuring practical tools, real-world impact case studies, and insights from industry experts.

With a practical curriculum curated by Phenix Capital Group, the Impact Investing Academy leverages extensive knowledge in impact investing harnessed since 2012.

The Academy guides investors on their impact journey, whether they are newcomers or seasoned impact allocators, helping them to define, implement, integrate, and innovate their impact strategies.

ABOUT THE HOST:

Phenix Capital Group (PCG) is an impact investment consultant and established impact investing advocate since 2012 with the mission to enable and catalyse institutional investments that realise social, environmental and financial returns. Since 2015, PCG has organized premier impact investing conferences for institutional investors, with its flagship event, [IMPACT SUMMIT EUROPE](#), held in the Netherlands. Their portfolio of specialised events has since grown to include satellite conferences such as [IMPACT SUMMIT AMERICA](#) in New York City and [IMPACT SUMMIT ASIA](#) in Singapore, underscoring their commitment to fostering global impact conversations. To further support the growth of local impact investing communities, PCG also hosts the global [IMPACT SEMINAR SERIES](#), which encourages deeper, region-specific discussions, and offers IMPACT INVESTING ACADEMY masterclasses, providing institutional investors with practical tools and expertise.



WHY OUR ACADEMY

WHAT YOU CAN EXPECT

- ◆ Learning, exchanging ideas and networking amongst a select group of institutional investor peers
- ◆ Training led by experts in the field with the real live impact investing experience, we offer 12 years of harnessing impact investing know-how focused on institutional investor needs.
- ◆ Practical know-how: the masterclass consists of theory presentation, real-world case-studies, demonstrations and group assignments: all designed to provide actionable and implementable knowledge to take back to the workplace
- ◆ Gain hands-on experience through exclusive access to proprietary sourcing tool containing 2600+ vetted impact funds during the masterclass.
- ◆ Access to Impact Reports on multiple impact themes & asset classes
- ◆ Certificate of Completion at the end of the masterclass for digital use.



LEARN IMPACT INVESTING TOOLS FROM EXPERTS

Learn from experts in IMM with practical knowledge in impact investing & academic background.



ACQUIRE INSIGHTS INTO BEST IMPACT PRACTICES

12 years of expertise in impact investing practices and advocacy.



EDUCATION FOCUSED ON INSTITUTIONAL ALLOCATORS

11 years of experience curating educational events for institutional investors & asset owners.



CONNECT WITH YOUR PEERS ON THE SAME JOURNEY

Learn amongst your peers, exchange best practices and co-create new approaches.



DEVELOP YOURSELF & YOUR ORGANISATION

Takeaway a set of actions & more sophisticated approaches to apply within your organisation.



ACCESS THE LATEST IMPACT DATA PUBLICATIONS

Receive Complimentary impact reports with impact investing market data.

MORE INFORMATION

FOR WHOM

This executive-level course is tailored for asset owners who are decision-makers within their organisations.

The content is specifically designed for Executives, Senior Portfolio Managers, ESG/Impact Investing officers, Allocators, and Fund Selectors of: pension funds, fiduciary managers, insurance companies, family offices, banks, sovereign wealth funds, foundations and endowments, development finance institutions, and faith-based organizations.

PARTICIPATION REQUIREMENT:

- No prior impact investing experience is necessary to follow this masterclass.
- This masterclass is **offered complimentary** (with value of 750, - Euro) through the support of industry collaborators and sponsors.
- The masterclass offers limited seats exclusively reserved for **institutional investors and asset owners**.
- Participation: In-person. Location choice: Munich or Zurich.



At the end of the masterclass, a digital certificate of completion is issued to participants upon successfully participating and applying knowledge within the workshop environment.

RESERVE YOUR SEAT!

[REGISTER HERE](#)



Are you interested in the masterclass, or do you have additional questions? Please contact our institutional investor relationship manager:

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