



School of  
Management



## COURSE SYLLABUS PROPOSAL

### FUNDAMENTALS OF SUSTAINABLE FINANCE AND INVESTMENTS

**Carlos Vargas**  
EGADE Business School (Mexico)

**July 21 - July 31**

**Monday - Friday (7:00 am - 10:00 am)**

**\*Saturday (9:00 am - 12:00 m)**



EGADE Business School  
Tecnológico de Monterrey

#### DESCRIPTION

The new normal in the financial world is Sustainability. Increased awareness on international markets led among other reasons by scarcity of resources, the search of profits through efficiency and climate change influence financial decisions worldwide. Investors react to and value ancillary factors in their financial decisions and sustainability continues to gain recognition. All business magazines and periodicals address the subject in their current editions. The Dow Jones even has a sustainability index and the search for profitability by means of efficiency transcends from trend into the new norm.

This course is the study of finance and sustainability as an integrated subject beginning with an introduction of financial and investment principles and moving towards financial analysis.

Financing and valuation. The course covers diverse aspects of sustainable investments and offers tools for effective financial valuation and effective risk assessment. The perspective proposed by this course is motivated by the desire of corporations for continued prosperity, expansion and in some cases even to promote their own survival.

Sustainability is in essence a triple bottom-line that includes economic, social and environmental considerations into its analysis. Sustainable Finance incorporates additional elements into that scope that include among others investment metrics, investment terms, risk, ethics, corporate responsibility, etc. Different approaches for investments and finance result from this analysis and new industries and products result from these added metrics.

## OBJECTIVES

The main objective of the course is to provide students with the necessary theoretical and conceptual tools used in investment analysis. Other learning objectives of the course include the review of diverse case studies within different industries to understand the implications of sustainability in priority areas of economy and the way they are reshaping global markets. At the end of the course students will be able to better understand how markets react to the new standards of sustainable finance and invest. Additionally, students will be able to develop a sustainable finance project.

## METHODOLOGY

The course will be taught online in the form of lectures and case studies intended for in- class discussion. Each student will be part of a study group discussion. Weighting for class participation will be derived from individual quizzes and threads of case studies and financial articles.

## EVALUATION

The grading of the course will be based on the following weighting scheme:

Participation	10%
Assignments & Case Studies	20%
Quiz	5%
Final Exam	40%
Final Project & Presentation	25%
	<u>100%</u>

## PRE-REQUISITES

Basic knowledge of finance.