

Day one

Wednesday 11 September

08:55 Opening remarks

Gina Gambetta, Senior Reporter, **Responsible Investor**

09:00 Plenary 1: Green horizons: Navigating transition finance in Canada

- Defining transition finance and its essential role in Canada's economy
- How can transition finance be deployed credibly?
- How do Canada's strategies and investments in the energy transition compare with those of the USA and Europe?
- Is transition finance compatible with net zero commitments?

09:50 Fireside chat: CSSB

Charles-Antoine St Jean, Chair, CSSB, **FRAS Canada**

Moderator: **Gina Gambetta**, Senior Reporter, **Responsible Investor**

10:05 Plenary 2: The future of ESG regulation and Canada's standards development

- Canada's taxonomy progress
- CSSB: What are the next steps?
- How are international ESG standards, such as the CSRD and the SEC's proposed climate disclosure rules, influencing Canadian ESG reporting and regulation?
- How can Canadian regulators balance the need for robust ESG standards whilst maintaining global competitiveness?
- How does the Canadian regulatory landscape currently accommodate the concept of double materiality in sustainability reporting?

Moderator: **Alison Joutsi**, Principal, **ESG Global Advisors**

David Andrews, Senior Legal Counsel, Investments, **HOOPP**

10:50 Networking break

11:20 Keynote

Please note, this is a draft document, session timings and descriptions are subject to occasional change.

11:40 Plenary 3: Public-private partnerships: Driving the next phase of energy transition

- How can collaboration between the public and private sectors be improved to facilitate investments in sustainable infrastructure and clean technologies?
- How can P3s incorporate Indigenous communities and social responsibility into their project planning and execution?
- What strategies are needed within P3 frameworks to ensure the resilience and adaptation of the real economy?
- What policy measures can be implemented to incentivize greater private sector engagement and investment in the energy transition?

Moderator: **Susan McGeachie**, Co-Founder & Managing Partner, **Global Climate Finance Accelerator**

12:25 Plenary 4: Climate-biodiversity nexus: Closing the gap with sustainable investment

- How is the TNFD framework being integrated in Canada? What can investors learn from early adopters?
- How to leverage data for a nature positive investment?
- How does nature and biodiversity support net-zero? What are the challenges and opportunities within the context of transition finance?

13:10 Lunch

Stream A	Stream B
<p>14:05 – A1: Decarbonization and credit markets</p> <ul style="list-style-type: none"> • How can investors ensure investments contribute to Canada’s decarbonization goals? • How can credit markets be leveraged more effectively to finance decarbonization? • What are the biggest challenges and opportunities in scaling up green financing in Canada? How do these compare globally? • Canada’s provincial carbon markets - how can we ensure their integrity and effectiveness? 	<p>14:05 – B1: Human rights and the supply chain</p> <ul style="list-style-type: none"> • Managing supply chain risk: the challenges for investors • Bill S-211: what are the biggest challenges in achieving compliance? • How can companies go beyond mere compliance to actively promote human rights? • What role does data play in managing human rights risks in supply chains, and how can investors and companies improve their data collection and analysis practices?

<ul style="list-style-type: none"> • What role do private credit markets play in ESG investing and sustainable finance? 	<p>Laurence Vigneau, Senior Advisor, Stewardship Investing, CDPQ</p>
<p>14:50 Short turnaround break</p>	
<p>14:55 – A2: Responsible AI</p> <ul style="list-style-type: none"> • Defining responsible AI and its impact and opportunities on the portfolio • Implementing AI through a responsible governance structure • How can companies guarantee transparency, fairness, and accountability in their AI systems? • Social implications of AI • How can AI strategies fit into companies overall ESG framework and long-term sustainability goals? 	<p>14:55 – B2: Sustainable agriculture and food systems</p> <ul style="list-style-type: none"> • Exploring the investment potential and impact strategies • In what ways can agricultural practices contribute to the energy transition beyond just adopting renewable energy sources? • Emissions Disclosure - How can we further reduce emissions in food supply chains? • Addressing the material risks of intensive animal agriculture en route to net-zero <p>Colin Saravanamuttoo, Executive Director and Canada Country Director, World Animal Protection Canada</p>
<p>15:40 Short turnaround break</p>	
<p>15:45 – A3: ESG Data: Enhancing the investment strategy</p> <ul style="list-style-type: none"> • How is ESG data incorporated into responsible investment decisions? • Quantity vs quality: what steps are being used to improve data verification and assurance processes? • How are investors needs changing on ESG data? • Global ESG reporting and disclosure and what this means for Canadian data users and providers 	<p>15:45 – B3: Proxy voting: Making your votes count</p> <ul style="list-style-type: none"> • Vote pre-disclosure: What are the challenges with gaining traction behind certain votes? • What elements make a shareholder proposal more likely to be supported by a majority of investors? • Shareholder proposal fatigue • Workers’ rights proposals and their impact

<ul style="list-style-type: none"> • Preparing for emerging data challenges: What are the challenges and lessons learned? 	<ul style="list-style-type: none"> • Key takeaways from 2024 proxy season <p>Moderator: Thomas Estinès, Co-CEO, GIR</p>
--	--

16:30 Networking drinks

18:00 End of day one

Day two

Thursday 12 September

8:30 Interactive roundtable discussions

1. Deforestation
2. Scope 3
3. Carbon markets
4. Water
5. Methane
6. Climate adaptation
7. Climate scenario analysis
8. ESG fixed income
9. Critical minerals
10. Investment opportunities in industrial decarbonization - **Susan McGeachie**, Co-Founder & Managing Partner, **Global Climate Finance Accelerator**

Stream A	Stream B
<p>9:40 – A4: What makes a credible transition plan?</p> <ul style="list-style-type: none"> • Transition funds: What are the challenges and opportunities in financing transition plans? • Assessing transition plans and tracking progress • The role of carbon pricing and offsets in transition plans • Integrating nature into net-zero transition plans 	<p>9:40 – B4: Investing in nature: Opportunities in biodiversity</p> <ul style="list-style-type: none"> • What innovative financial instruments and models have shown promise in funding biodiversity conservation efforts? How can these models be scaled or adapted for different contexts? • What are the primary risks and challenges investors face when integrating biodiversity

<p>How can cross-sector collaboration enhance the effectiveness of transition plans?</p>	<p>considerations into their portfolios, and how can these be mitigated?</p> <ul style="list-style-type: none"> • What are the emerging trends in nature finance, and how should investors position themselves to take advantage of these? <p>How can investors adopt a nature-positive strategy in the portfolio?</p>
<p>10:25 Networking break</p>	
<p>10:50 – A5: Navigating climate risk and materiality in Canada</p> <ul style="list-style-type: none"> • What are the best strategies to assess and manage climate risks in the portfolio? • How should investors approach asset valuation and risk assessment differently to protect their investments? • Physical risk vs transition risk <p>Alison Schneider, Canadian Representative, CERES</p>	<p>10:50 – B5: Benefits of Indigenous investments</p> <ul style="list-style-type: none"> • Understanding landscape of opportunities • What are the associated risks? And how can we mitigate these? • Engaging with First Nations companies – How can investors build a better relationship? • Indigenous Investments = social impact <p>Karen Bird, Chief Capital Officer, Indigenous Impact Investment Circle</p>
<p>11:35 Short turnaround break</p>	
<p>11:40 – A6: ESG bonds: Diversifying beyond green</p> <ul style="list-style-type: none"> • Green Bond Framework - Are green bonds supporting the transition? How can Canada optimize the use of green bonds and loans to fund its transition to a sustainable economy? • What are the potential risks and rewards associated with investing in nuclear bonds? • How is the Canadian market addressing the risk of 'greenwashing'? 	<p>11:40 – B6: Social responsibility: Risks, challenges, and opportunities</p> <ul style="list-style-type: none"> • What are the social risks that investors should be thinking about? • How can investors help alleviate social issues such as DEI, housing crisis, and aging demographics? • How are investors measuring and reporting on the social impact of their investments? • How can sustainable investments positively contribute to social goals?

<p>in bond issuances, and what mechanisms are in place to ensure authenticity?</p> <ul style="list-style-type: none">• Social bonds and a just transition: How are Indigenous communities and projects being integrated into the sustainable bond market in Canada?	<ul style="list-style-type: none">• What are the main challenges of integrating social responsibility into investment decisions?
---	--

12:25 Lunch

13:10 Keynote

13:30 Plenary 5: Effective engagement strategies for sustainable investing in Canada

- Active ownership vs passive ownership
- How do you achieve impact in engagement and measure success?
- Brown stripping vs engagement: How are Canadian investors engaging with the oil and gas sector?
- How has the landscape of Canadian engagement evolved in recent years?

14:15 Plenary 6: Investing in zero: Finances and strategies of climate change

- Scale of investment necessary to reach 1.5C: What are the challenges and opportunities for investors?
- How are asset owners approaching provincial decarbonization efforts in their portfolios?
- What is keeping investment senior leadership up at night in 2024?
- How are asset owners and asset managers coping with growing geopolitical uncertainties? What challenges are they facing?

Alex Side, Senior Principal, **IMCO Infrastructure**

Katharine Preston, Vice President, Sustainable Investing, **OMERS**

15:00 End of conference