

Pressemitteilung

Interesse an nachhaltigen Geldanlagen nimmt europaweit zu – Eurosif-Studie untersucht erstmals Anforderungen institutioneller Investoren

Heute präsentiert Eurosif (European Sustainable Investment Forum), der europäische Dachverband für nachhaltige Investments zusammen mit der Bank Sarasin & Cie. AG in Frankfurt die Ergebnisse der ersten „Eurosif Investment Consultants & Responsible Investment Study“.

In der europaweiten Studie wurde erstmals untersucht, welche Anforderungen institutionelle Investoren an Berater stellen und wie nachhaltige Aspekte in die Finanzberatung integriert werden.

Rund 89 Prozent der europaweit 300 befragten Beratungsunternehmen erwarten in den nächsten drei Jahren ein steigendes Kundeninteresse zur Einbeziehung nachhaltiger Aspekte in die Beratung.

Das größte Wachstum sehen die Anlageberater bei Themenfonds und beim Best-in-Class-Ansatz. Besonders das zunehmende Interesse von institutionellen Investoren an Responsible Investing und die wichtiger werdende Rolle der Beratung bei der Geldanlage bieten große Chancen und Möglichkeiten für Finanzberater. Daneben wird das Thema Nachhaltigkeit für die Reputation der Anlageberater zunehmend relevant. Nachholbedarf sieht die europaweit erste Studie dieser Art beim Wissen der Berater und Anleger über Geldanlagen mit ökologischen, sozialen und ethischen Kriterien.

Die komplette Eurosif-Studie (in englischer Sprache):

http://www.eurosif.org/media/files/eurosif_investment_consultants_ri_study

Weitere Informationen können Sie der nachfolgenden Pressemitteilung von Eurosif entnehmen (in englischer Sprache). Hier finden Sie auch alle anderen **Pressekontakte** von Eurosif, Bank Sarasin & Cie. AG, SAM, AXA Investment Managers und Robeco.

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Das **Forum Nachhaltige Geldanlagen** – Der Fachverband für Nachhaltige Geldanlagen in Deutschland, Österreich und der Schweiz. Das Forum Nachhaltige Geldanlagen e.V. (FNG) repräsentiert über 100 Mitglieder aus dem deutschsprachigen Raum, die sich für mehr Nachhaltigkeit in der Finanzwirtschaft einsetzen. Dazu zählen u.a. Finanzberater, Banken, Versicherungen, Rating-Agenturen, Investment-Gesellschaften, Vermögensverwalter, NGOs und wissenschaftliche Einrichtungen. Das FNG fördert den Dialog und Informationsaustausch zwischen Wirtschaft, Wissenschaft und Politik und setzt sich seit 2001 für verbesserte rechtliche und politische Rahmenbedingungen für nachhaltige Geldanlagen ein. Das FNG ist Gründungsmitglied des europäischen Dachverbandes **Eurosif (European Sustainable Investment Forum)**.



Eurosif

Press Release: Wednesday December 2, 2009

Eurosif study finds a growing demand for ESG advisory services

Paris, France – December 2, 2009: Eurosif has just published a ground-breaking report on Investment Consultants and Responsible Investment. This timely study, sponsored by AXA Investment Managers, Bank Sarasin, Robeco and SAM found that 89% of investment consultants anticipate an increase of client interest when it comes to environmental, social and governance (ESG) issues.

The demand for investment consultants to take into account ESG issues is driven by a mixture of investor reputation, beneficiary pressure and an evolving view on fiduciary duty. All of these drivers create opportunities for ESG advisory services.

Melissa McDonald, head of responsible investment at AXA Investment Managers says “This study has highlighted two key challenges for asset managers who are committed to delivering sustainable and better risk adjusted returns. It is clear that there is a lack of understanding around the contribution of ESG investment to the sustainability of returns and a resulting lack of explicit client signals within the institutional investment process and it is these challenges that we at AXA IM want to respond to as part of our long term commitment to the mainstreaming of ESG.”

Three different types of institutional investors are behind this trend: corporate pension funds, public pension funds and family offices or high net worth individuals. Their interests range from advice around thematic investing to counsel on integration of ESG issues across all asset classes.

Frank Wettlaufer, Head Institutional Clients International at Bank Sarasin states, “With increasing numbers of sustainable strategies, asset classes and products, it is becoming easy for institutional investors to invest in attractive products and styles. Consultants screening the financial offerings in the market place therefore play an increasingly important role.

This study reveals that investment consultants offer a diverse product range of ESG services. As investors delve more deeply into ESG matters over time, client demand will continue to be varied. Investor demands focus on all aspects of responsible investment (RI): how to incorporate RI into their investment strategy, mandate design, investment policy, fund selection and selection of external research providers.

Fernand Z.H. Schürmann Senior Vice President at Robeco says “We sponsored Eurosif’s study because we believe it is of great importance to show how the inclusion of sustainable items in investment decisions can add value. We believe that the consultant community is key to this development to gain further momentum for asset owners and asset managers.”

Ruud Wilders, Head of Marketing, Communication and Sales Management at SAM states, “One of our key conclusions from the study is that investment consultants and their clients still require more robust information on the link between ESG factors and investment performance. The report shows that 36% of the consultants evaluate the fund manager’s ability to incorporate ESG as a routine part of their assessment of fund manager competence. As such, we look forward to playing a role as a discussion partner on this topic.”

Barriers certainly exist that prevent consultants from quickly developing their ESG service offerings, and key among them is the need for greater education and training. Additionally, asset owners need to be more explicit about RI by clearly stating their beliefs on ESG issues and responsible investment.

Matt Christensen, Eurosif’s executive director says, “Service development will remain a key facet to monitor as it is not yet clear whether newer or established firms will best respond to the growing ESG demand for services. Certainly, the Eurosif study shows that some firms are aggressively developing products and services in anticipation for further market growth in the coming years.”

The US Social Investment Forum is releasing a similar study today, focussing on US based consultants. Both the European and US reports show parallel trends in terms of expectation of future growth, drivers and current practices of the consultants. Differences are found in the type of strategies advised on. For instance, European clients seek more advice on positive selection than their American counterparts. Lisa Woll, CEO of the US Social Investment Forum, said that: "The virtual consensus among European and US investment consultants that client interest in ESG will grow is very positive. However, both our studies make clear that much remains to be done to ensure that the industry is proactive in offering ESG related services and sufficiently knowledgeable to respond effectively as client demand grows."

To view the report please go to http://www.eurosif.org/publications/investment_consultants_ri

To view the report from the US Social Investment Forum please go to: <http://www.socialinvest.org>

Notes to Editors

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EUROSIF, the European Sustainable Investment Forum, is the pan-European network whose mission is to address sustainability through the financial markets. Eurosif works as a partnership of the national Sustainable Investment Forums (SIFs) within the EU and with the support and involvement of Member Affiliates. Recognised as the premier European forum for sustainable investment, Eurosif's Member Affiliates are drawn from leading pension funds, asset managers, NGO's, trade unions, academic institutes and research providers, together representing assets totalling over €1 trillion. Eurosif's work includes a focus across asset classes - equity and fixed income markets, microfinance, renewable energy, property, private equity and hedge funds - all centred around the industry trends and future legislation affecting this space. The key benefits that Eurosif affiliate members receive include EU interfacing, SRI information and European wide initiatives that integrate Environmental, Social and Governance (ESG) issues into the financial services sector. For the full list of Eurosif Member Affiliates, please see www.eurosif.org.

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AXA Investment Managers is a multi-expert asset management company within the AXA Group, a global leader in financial protection and wealth management. AXA IM is one of the largest European-based asset managers with approximately €503 billion in assets under management as of the end of September 2009. AXA IM employs nearly 3,000 people around the world and operates out of 22 countries.

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Bank Sarasin & Co. Ltd – Sustainable Swiss Private Banking since 1841 – www.sarasin.ch

Bank Sarasin is a leading Swiss private bank whose many years of banking experience has made it consciously opt for sustainability as a key component of its corporate philosophy. It provides a high level of service and expertise when acting as investment advisor and asset manager for private and institutional clients. The Sarasin Group is represented in more than 20 locations in Europe, the Middle East, and Asia. By end of June 2009 it managed total client assets of CHF 79.9 billion and employed around 1,500 staff. Bank Sarasin & Co. Ltd is listed on the SIX Swiss Exchange. Its majority shareholder is the AAA-rated Dutch Rabobank.

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Robeco, established in Rotterdam in 1929, offers investment products and services to institutional and private investors worldwide. It has around EUR 127 billion in assets under management (at 30 September 2009). The product range encompasses equity and fixed-income investments, money-market funds, responsible investing and alternative investments, including private equity, hedge funds and structured products. The various strategies are managed from Rotterdam (head office), Boston, Hong Kong, New York, Paris and Zurich.

To service institutional and business clients, Robeco has offices in Bahrain, Belgium, China, France, Germany, Japan, Korea, Luxembourg, Singapore, Spain, Taiwan, Switzerland and the United States. Robeco has a banking license in France and the Netherlands, where it can sell its products straight to private clients. Robeco holds a 100% interest in Corestone (Zug, Switzerland), Harbor Capital Advisors (Chicago, US) and Transtrend (Rotterdam, the Netherlands). Robeco also holds a majority interest in SAM Group (Zurich, Switzerland), a 49% interest in Canara Robeco Asset Management (Mumbai, India) and a 40% interest in AIM (Rijmenam, Belgium).

Robeco is part of Rabobank Group, one of the few privately owned banks in the world with the highest credit ratings from Moody's and Standard & Poor's. Furthermore, within the banking sector, Rabobank is one of the global leaders in terms of corporate social responsibility and sustainability.

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SAM is an investment boutique focused exclusively on Sustainability Investing. The firm's offering comprises asset management, indexes and private equity. Its asset management capabilities include a range of single-theme, multi-theme and core sustainability investment strategies catering to institutional asset owners and financial intermediaries in Europe, the United States, Asia-Pacific and the Middle East. Through its index activities, SAM has partnered with Dow Jones Indexes and STOXX Limited for the publication and licensing of the globally recognized Dow Jones Sustainability Indexes (DJSI) as well as customized sustainability benchmarks. Furthermore, SAM is the center of expertise for clean tech private equity within Robeco.

Based on its Corporate Sustainability Assessment, SAM has compiled one of the world's largest sustainability databases and analyzes over 1,000 listed companies annually. SAM's proprietary research and sustainability data are fully integrated into its offering.

SAM is a member of Robeco, which was established in 1929 and offers a broad range of investment products and services worldwide. Robeco is a subsidiary of the AAA-rated Rabobank Group.

SAM was founded in 1995, is headquartered in Zurich and employs over 100 professionals. As of September 31, SAM's total assets amount to EUR 9.5 billion.