

## Press release

Zurich, 5 April 2004

### **SAM sees dynamic growth in Europe and increases its assets under management by 88% to CHF 1.5 billion**

In the 2003 financial year, SAM Group (SAM Sustainable Asset Management), an independent specialist focused on institutional asset management, investment funds and private equity, saw dynamic growth in the volume of assets under its management. These assets, managed mainly on behalf of institutional investors, banks and investment fund companies, rose by 88%, or more than CHF 700 million in the 2003 financial year and including Q1 2004, to a total of CHF 1.5 billion.

This impressive increase in assets under management is the result of a surge in demand for sustainable investments especially in Switzerland, Germany, Sweden and Italy. The strong growth was achieved in particular with the addition of mandates from large pension funds and from new investment funds. For the first time, SAM's product portfolio was extended to include a number of fixed-income funds and mandates. The company's services range from private equity, management of equities and fixed-income mandates and investment funds, to providing sustainability advice on portfolio matters and optimising existing portfolios, mainly of institutional investors.

Last year SAM entered into selective alliances with strong distribution partners in Germany (HSBC Trinkaus Burkhardt), Italy (Monte dei Paschi Group) and Switzerland (Swiss Life Asset Management). Partly in conjunction with these alliances, SAM launched eight new sustainability investment funds in four European countries.

To respond to increased demand for sustainability investments, SAM has opened offices in Stockholm and Barcelona. The SAM Group was also recognised as the leader in Sustainability Research in an independent study conducted by SustainAbility (London) and the Mistra Foundation (Stockholm).

In a dramatically changing environment for institutional asset management, SAM anticipates further strong demand (double-digit growth) for long-term investment strategies geared towards sustainability. Particularly investors with long-term horizons, such as pension funds, family offices and foundations, are increasingly putting their money into sustainability investments. Demand is also being fuelled by sustainable investment guidelines introduced by legislators in a number of European countries, including Sweden, Germany, the UK and Italy.

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**SAM Sustainable Asset Management** was founded in 1995 as an independent asset management company for sustainability investments. Today SAM is one of the world's leading institutions in this sector. Its clientele includes banks, insurance companies, pension funds, foundations and private clients.

SAM carries out systematic research to identify successful companies that meet sustainability criteria. The integration of these future-oriented criteria into the investment process provides investors with a high degree of security, transparency and an attractive return.

In addition to individual mandates for institutional investors and private clients, SAM offers financial products in the areas of innovative energy technologies, sustainable food production, water, resource efficiency, sustainability pioneers, sustainability leaders and private equity.

SAM's expertise is based on its own independent research and an active worldwide sustainability network. Together with Dow Jones Indexes and STOXX, SAM has launched a family of sustainability indexes to track the performance of companies that are industry leaders in terms of sustainability. As part of this process, SAM assesses over 1,000 companies every year.

SAM Sustainable Asset Management is headquartered in Zurich (Switzerland), with branches and representative offices in Sonoma (California, USA), Melbourne (Australia), Milan (Italy), Stockholm (Sweden) and Barcelona (Spain).

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