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SAM Forum 2009 analyzes key sustainability trends for investors

- **International leaders from the world of asset management, commerce and non-governmental organizations came together at the SAM Forum 2009.**
- **Sustainability investments are becoming mainstream, with sustainability criteria also being taken into account in the fixed-income segment.**
- **For investors, enhanced corporate governance, climate change and the potential for a “greentech revolution” as the result of government economic stimulus packages are the key sustainability trends to be expected in 2009.**

On 26-27 January 2009, SAM (Sustainable Asset Management), one of the world's leading asset managers for sustainability investments, launched the SAM Forum, which in future will be held annually. The event brought together more than 100 invited leaders from the world of asset management, commerce and non-governmental organizations with the goal of analyzing key sustainability trends that can be of benefit to investors in 2009 and discussing long-term scenarios.

Dr Rajendra K. Pachauri, Director General of TERI and Chairman of the Intergovernmental Panel on Climate Change (IPCC), which in 2007 was awarded the **Nobel Peace Prize**, stated at the SAM Forum 2009: “A price on carbon is crucial to mitigate global warming. Success in the upcoming climate change conference in Copenhagen in December will be essential in that context and will also offer a vast array of new investment opportunities.”

In various workshops, the latest developments in sustainability were addressed and fleshed-out in panel discussions and lectures.

The following sustainability trends of relevance to investors took center stage at the SAM Forum 2009:

- **Institutional investors** such as pension funds and foundations play a vital role in the shaping and enforcement of **corporate governance regulations** and **risk management rules** that have more traction.
- Government economic stimulus packages in the USA and Europe open up historical opportunities (in terms of sustainability) for the emergence of a **greentech revolution**. A success of the **climate conference in Copenhagen** scheduled for next December would also represent an important milestone. Energy-efficient (green) buildings, intelligent electric power networks (smart grids), as well as renewable and clean energy sources are just a few examples of the investment themes that are of special significance to investors with a long-term investment horizon.
- The **success of sustainability investments** has justifiably given rise to the expectation that investing in accordance with sustainability criteria will become a **mainstream approach** in the asset management industry. The past successful inclusion of **sustainability criteria** in stock selection will also play an increasingly important role in **bond investments**. Fixed-income securities represent a significant portion of the world's institutional and private assets under management.

At the SAM Forum 2009, the following leaders expressed their opinions on the topic of sustainability:

Tim Barron, President and CEO of Rogerscasey – a leading US investment solutions firm – said: "Institutional investors have to become engaged. The worst thing you can do is not to understand the impact of sustainability upon your investment portfolio. To put your head in the sand – which is a common solution – is very likely at some point in the future to be considered irresponsible in your fiduciary function."

Tessa Tennant, Founding Chair of the Association for Sustainable & Responsible Investment in Hong Kong, said: "If there is one thing that institutional investors can do in 2009, it is to call for the greening of the bailout packages being finalized by governments. This is a once in our lifetime opportunity to accelerate green growth across the world, and enough investors now understand what needs to be funded and how."

Video interviews with Tim Barron and Tessa Tennant conducted at the SAM Forum 2009 will shortly be accessible on the Internet at www.sam-group.com.

In addition, **Sander van Eijkern, CEO of SAM**, summarized at the closing note of the SAM Forum 2009: "At the SAM Forum, a wide array of findings and opinions on sustainability investing were exchanged. What I have heard here confirms to me that, in my estimation, sustainability investments will become a mainstream form of investment in the very near future. SAM will play a leading role in this evolution."

For further information, please contact:

Kim-My Schefer
Head Corporate Communications
Josefstrasse 218
CH-8005 Zürich
Telephone: +41 44 653 10 02
Mobile: +41 79 744 78 07
E-mail: com@sam-group.com

About SAM (Sustainable Asset Management)

SAM (Sustainable Asset Management) was founded in 1995 as one of the world's first asset management companies for sustainability investments. Today, the company ranks among the globally leading managers of sustainable investments and theme-based funds. Its worldwide clientele comprises banks, insurance companies, pension funds, family offices and private investors.

SAM has a comprehensive portfolio of theme-based products in the areas of new energy sources, water, new materials, healthy living and climate. In addition, it offers institutional investors a broad range of various investment solutions. SAM affords investors a great sense of responsibility and transparency in terms of their investments.

SAM evaluates and analyzes leading companies on the basis of general and industry-specific sustainability criteria considering economic, environmental and social dimensions. Integrating those future-oriented investment criteria into the company valuation and investment process represents the foundation of its investment philosophy. SAM's know-how is based on its proprietary, independent research approach and an active, international sustainability network.

Together with Dow Jones Indexes and STOXX, SAM has launched an entire family of sustainability indices to measure the performance of companies that hold a top position in their industry in terms of sustainability. Within the framework of this collaboration, SAM has compiled one of the world's largest

sustainability databases and analyzes annually more than 1,000 exchange-listed companies for the added value they generate in terms of economic, environmental and social criteria.

SAM and Robeco, a member of the Dutch Rabobank Group (S&P AAA), have entered into a strategic alliance in order to establish for product development, innovation and distribution purposes the world's leading platform for sustainability investments. As a part of this collaboration, the managers and staff of SAM and Robeco are shareholders of SAM.

SAM is headquartered in Zurich (Switzerland) and is present in Europe, Australia, the USA and Canada. The company employs 100 individuals.