

Leading by example

SAM began life as an independent investment boutique focusing exclusively on sustainability investing and has since grown to become one of the world's leading institutions in this field. "Since we were established in 1995, we have focused on identifying, interpreting and quantifying sustainability factors and integrating them into our investment process," says the company. Amid challenging market conditions following the financial crisis, SAM has continued to reinforce its role as a thought leader and innovator. "We continue to build the investment case for sustainability investing, encouraging a more long term approach to investing, through collaboration with numerous industry peers and research institutions."

OPEN SPACE FOR DEBATE

In January 2009, SAM hosted the first annual SAM Forum. "This brought together over 100 leaders from the fields of asset management, commerce and non-governmental organisations with the goal of analysing key sustainability trends that will shape future industries and financial markets," says SAM. "Among the highlights of the event, was a discussion led by Nobel Peace Prize winner Rajendra Pachauri on sustainability forecasts over the next 10 years. By connecting key decision-makers among asset owners and asset managers, the SAM Forum serves as a platform for establishing a global community of thought leaders and practitioners of sustainability investing in order to launch initiatives with the overall goal of making financial markets more sustainable," it explains.

PARTNERS FOR A BETTER FUTURE

True to its promise, SAM's activities during 2009 are characterised by a series of highly respectable and well-conceived joint ventures. "We have continued throughout the year to collaborate on empirical research with the publication of white papers on sustainability investing, including a jointly published comprehensive study with

Highlights and achievements

SAM, the specialist sustainable investment manager, has been at the forefront of its field since it was founded fourteen years ago. SAM understands it will reach further and influence more by joining forces with other prominent ESG organisations, and 2009 was once again highlighted by its pursuit of the best partnerships to ensure the best exchange of ideas. To further this concept, it now runs a successful annual ESG forum providing an extensive ESG and SRI platform. SAM's achievements are destined to become enshrined in ESG best practice and the way the UN PRI singles it out time after time reinforces this point.

ETH Zurich and ZHAW on banking and climate change which examines how banks respond to the challenges and opportunities of climate change in their governance, operations, and core business," it begins.

EXPANDING INVESTMENT RANGE

"Next we continued to launch innovative investment strategies. In partnership with London-based Gatehouse Bank, a specialist in Islamic finance, we expanded our range of global investment strategies with the launch of the first ever Shariah-compliant water-focused investment strategy in July. An additional development was the transfer of Robeco's Cleantech private equity activities from Rotterdam to SAM, expanding our research capabilities and broadening our range of sustainability strategies to include more asset classes. Investee companies and funds must commit to adopting a series of ESG best practices, thus encouraging sustainable corporate behaviour," it continues.

CLEAR LEADER

This year was also marked by SAM's continued position as an industry leader in ESG integration. "In the individual results released by the UN Principles for Responsible Investment (UN PRI), SAM was ranked in the first quartile with regard to Principle 1, requiring signatories to incorporate environmental, social, and corporate governance into investment analysis and decision-making processes which was voted the most difficult principle to implement," SAM says.

Judges

Axel Wilhelm
Sustainalytics
T - 0049 69 719 146 917
E - axel.wilhelm@sustainalytics.com

Angela de Wolff
ConSer
T - 0041 7 9342 8807
E - angela.dewolff@gmail.com

Michael Jantzi
Jantzi Research Inc
T - 0041 6 861 0403 x 12
E - mjantzi@jantziresearch.com

Magnus Furugard
GES Investment Services
T - 0046 8 787 99 11
E - magnus.furugard@ges-invest.com

Matt Christensen
Eurosif
T - 0033 1 4020 4338
E - mattc@eurosif.org

Mairead Hancock
Eiris
T - 0044 (0)20 7840 5716
E - mairead.hancock@eiris.org

Davide dal Maso
Vigeo
T - 0039 02 36518110
E - davide.dalmaso@vigeo.com