

Media release

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SAM Group achieves strong growth and increases its assets under management by 72% to over CHF 3.1 billion

SAM (Sustainable Asset Management) Group, which specialises in institutional asset management, investments funds and private equity, saw its assets under management grow more than average in the 2005 financial year. Since 1 January 2005 the assets it manages primarily on behalf of institutional investors, banks and investment fund companies have soared 72%, or CHF 1.3 billion, to a total of CHF 3.1 billion.

SAM Group is one of the few truly independent asset managers in Europe and in recent years has managed to consistently grow its assets under management by around 45% p.a. Today SAM Group is one of the biggest asset managers specialising in sustainable investments, and is an international leader in this field. The company now employs over 60 people and is globally active. The steep increase in the assets managed by SAM Group compared with its industry peers is the result of a strategy focused on sustainable thematic funds and large institutional investors in Europe and North America.

The two theme-based funds SAM Sustainable Water Fund and SAM Smart Energy Fund made a particularly strong contribution to the broadly supported growth. In the area of private equity, SAM Group manages two private equity funds and various customer mandates focused on clean technology ("cleantech") investments. Overall SAM Group has around CHF 300 million invested in private equity, making it one of the biggest players in cleantech investments.

SAM Group also achieved a better than average result through its index cooperation with Dow Jones and STOXX. The sustainability indices produced by SAM Group broke the EUR 4 billion barrier for the first time.

Thanks to its strong positioning and persistently buoyant demand, SAM Group once again anticipates double-digit percentage growth for the current financial year.

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SAM Group 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 control, transparency and an attractive return.

SAM offers investors a broad range of standardised products and customised mandates. SAM also has a private equity arm that invests mainly in the future themes of new energy technologies, water and new material technologies.

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. To this end, SAM analyses over 1,000 companies a year.

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