

## Press release

Zurich, February 20<sup>th</sup>, 2004

### **Independent expert study confirms SAM as the leader in sustainability research**

A new report "Values for money: Reviewing the Quality of SRI Research" released recently by **SustainAbility** supported by **Mistra** the Swedish Foundation for Strategic Environmental Research involves a detailed review of 15 SRI Research organizations from around the world and identified SAM Research, the research arm of SAM Sustainable Asset Management, as the leading organization involved in SRI/Sustainability research.

The report applied an assessment framework based on six different categories focusing on different aspects critical for a research organization. In four out of six categories SAM was identified as best-practice. In the remaining two categories, the authors did not identify any best-practice examples. Innovest Strategic Value Advisors from Canada was mentioned in two categories and six other research organizations were mentioned in one category each.

Reto Ringger, CEO and founder of SAM Sustainable Asset Management was delighted about these excellent findings: „Excellent independent research is the basis for successful investment performance. The internationally renowned Sustainability Research of SAM benefits exclusively our clients and flows into all of SAM Asset Management products. It is also the basis for the Dow Jones Sustainability Indexes family.“

For Alois Flatz, Head of Research, the results of this report are recognition and endorsement of SAM's strategy: "SAM analyses the influence of sustainability trends on the financial performance of companies. Trends such as corporate governance, climate change or stakeholder management can potentially represent considerable risks and as such have a significant influence on the valuation of companies. Institutional investors increasingly demand this form of corporate analysis."

The report, based on a review of 15 most important specialist SRI research organizations applied an assessment framework based on the following six criteria: research methodology, quality of information sources used, quality of research processes, quality of the research team, client service quality and transparency.

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**SAM Sustainable Asset Management** was founded in 1995 as an independent asset management company specializing in sustainability investments. Today SAM ranks among the world's leading institutions in this sector. Its clients include banks, insurance companies, pension funds, trusts as well as private investors.

Through systematic analysis, SAM seeks to identify companies with sustainable success criteria. Integrating these forward-looking criteria with the investment process gives the investor the greatest possible degree of control, transparency and an attractive return.

Besides individual mandates for institutional investors and private clients, SAM offers financial products in the field of future-oriented energy technologies, sustainable food production, water, efficient use of resources, sustainability pioneers, sustainability leaders and private equity.

SAM's expertise stems from its own research as well as an active, worldwide sustainability network. In cooperation with Dow Jones and STOXX, SAM launched the world's first family of sustainability indices, tracking the performance of companies that lead their industry in terms of sustainability. For SAM this means evaluating more than 1,000 companies each year.

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

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