

Zurich, January 26, 2012

## **SAM and KPMG publish 2012 Sustainability Yearbook**

- **Yearbook rates most sustainable companies globally and announces sector leaders**
- **Europe leads – companies from Portugal, Spain and Italy set the bar for corporate sustainability**
- **Companies use sustainability strategies to drive innovation and create competitive edge**

SAM, the investment boutique focused exclusively on Sustainability Investing, today launched its 9<sup>th</sup> annual *Sustainability Yearbook 2012* (the Yearbook) at the World Economic Forum in Davos. Produced in collaboration with KPMG, one of the world's leading providers of audit, tax and advisory services, the Yearbook presents the companies recognized as sustainability leaders from the 58 sectors examined by SAM's Corporate Sustainability Assessment (CSA). The *SAM Sector Leaders* are firms that set the industry standard for environmental, social and governance practices. The Yearbook also highlights four perspectives on current sustainability topics, including innovation.

### **European companies demonstrate highest relative presence in Sustainability Yearbook**

Companies in Europe are ahead of the pack. This year, Portugal emerges as a global leader in corporate sustainability followed by Spain and Italy. Out of all Portuguese companies eligible for inclusion in the Yearbook, 67% are included. The United States actually lags behind its European counterparts with only 9% of all eligible American companies making the cut for the Yearbook this year. Full information can be found in SAM's [Sustainability Yearbook](#).

**Michael Baldinger, CEO of SAM:** *"With the publication of the 2012 Yearbook I see more companies understanding that taking a sustainable approach to business creates value for shareholders as well as other stakeholders. We are pleased that companies continue to aspire to higher sustainability standards. To reflect this we have tightened the eligibility criteria for the awards to recognize the companies that are best able to manage risks and responsibly seize future opportunities."*

### **Innovation driven largely by sustainability initiatives**

SAM has been evaluating companies on their innovation management approach since 2009 and results show that an effective sustainability strategy is one of the key drivers of innovation. Additionally, recent findings show that 24% of companies have an excellent innovation management performance, 37% are average, and 39% have a poor performance. Consumer goods, healthcare and basic materials are the sectors with the highest percentage of companies receiving an excellent innovation score. Geographically, Europe and Asia (ex. Japan) have the most companies with excellent innovation performance, while scores are lower in North America and Japan.

### **SAM raises the bar: eligibility criteria for sustainability excellence awards strengthened**

With the increasing importance of sustainability on corporate agendas, the annual competition for inclusion in the Yearbook is getting harder. To reflect the improved sustainability performance of companies, SAM has toughened the eligibility criteria for its excellence awards. Although a greater

number of companies were eligible for Yearbook inclusion this year, a smaller percentage have received a SAM award.

**Sustainability excellence awards**

Companies with the highest score in their sector receive recognition as *SAM Sector Leaders* and are considered to be the best prepared to seize the opportunities and manage the risks deriving from economic, environmental and social developments. Companies that achieved the largest improvement of their sustainability performance are recognized as *SAM Sector Movers*. Out of the 433 companies that were included in the Yearbook, the following awards were given to companies: 87 *SAM Gold Class*, 41 *SAM Silver Class* and 92 *SAM Bronze Class*.

**Informative links:**

- View the electronic version of [The Sustainability Yearbook 2012](#)
- View the list of [SAM Sector Leaders](#)

**Sustainability Yearbook Construction: Methodology Overview**

The world's 2,500 largest companies (based on the Dow Jones Global Total Stock Market Index) are invited to participate in SAM's Corporate Sustainability Assessment every year. Only the top 15% from each of the 58 SAM sectors qualify for inclusion in The Sustainability Yearbook.

**SAM Sector Leader and SAM Sector Mover:**

 <p>For each sector, the company with the highest score is named the SAM Sector Leader. This company is considered to be the one within its sector that is best prepared to seize the opportunities and manage the risks deriving from economic, environmental and social developments.</p>	 <p>Within the top 15% of each sector, the company that has achieved the largest proportional improvement in its sustainability performance compared to last year is named the SAM Sector Mover.</p>
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**SAM Gold, Silver, and Bronze Class:**

 <p>Companies whose score is within 1% of the Sector Leader's score receive the SAM Gold Class award. Consistent with our "Best-in-Class" methodology, the Sector Leader from each sector also receives the SAM Gold Class distinction, meaning that each of the 58 sectors has at least one gold medalist.</p>	 <p>All companies receiving a score within a range of 1% to 5% from the score of the Sector Leader receive the SAM Silver Class distinction.</p>	 <p>Companies whose score is within a range of 5% to 10% from the score of the Sector Leader receive the SAM Bronze Class distinction.</p>
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*If you would like to order a hardcopy of The Sustainability Yearbook 2012, please send an email to: [yearbook@sam-group.com](mailto:yearbook@sam-group.com)*

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### **About SAM**

SAM is an investment boutique focused exclusively on Sustainability Investing. The firm's offering comprises asset management, indexes and private equity. Its asset management capabilities include a range of single-theme, multi-theme and core sustainability investment strategies catering to institutional asset owners and financial intermediaries in Europe, the United States and Asia-Pacific. Through its index activities, SAM has partnered with Dow Jones Indexes for the publication and licensing of the globally recognized Dow Jones Sustainability Indexes (DJSI) as well as customized sustainability benchmarks. Based on its Corporate Sustainability Assessment, SAM has compiled one of the world's largest sustainability databases and analyzes over 2,000 listed companies annually. SAM's proprietary research and sustainability data are fully integrated into its offerings.

SAM is a member of the global asset manager Robeco, which was established in 1929 and offers a broad range of investment products and services. Robeco is committed to [Responsible Investing](#) and the group-wide implementation of RI principles. Within Robeco, SAM acts as the center of expertise for Clean Tech Private Equity. In addition, SAM represents Robeco in its domestic Swiss market, handling sales, client servicing and marketing on behalf of the parent company. Robeco is a subsidiary of the Rabobank Group, which has the highest credit rating of all privately owned banks, awarded by rating agencies Moody's, Standard & Poor's, Fitch and DBRS. SAM was founded in 1995, is headquartered in Zurich and employs over 100 professionals. As of December 31, 2011, SAM's total assets amount to USD 11.4 billion.

Sustainable Asset Management, USA Inc. ("SAM" or the "Firm") is an Investment Adviser registered with the Securities and Exchange Commission under the Investment Advisers Act of 1940. SAM is a subsidiary of Robeco Groep N.V. ("Robeco"), a Dutch investment management firm headquartered in Rotterdam, the Netherlands. In connection with providing investment advisory services to its clients, SAM will utilize the services of certain personnel of SAM Group Holding AG ("AG"), and Robeco Investment Management, Inc. ("RIM"), each a wholly owned subsidiary of Robeco Group.

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