

Media Release

Zurich, October 2, 2014

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RobecoSAM has three new capabilities in two different asset classes

- **Leading examples of how ESG can be integrated across various asset classes**
- **Quant Sustainable Global Equities Fund and Private Equity capabilities serve different client needs**
- **Continued drive to innovate and provide clients with sustainability strategies**

RobecoSAM, the investment specialist focused exclusively on Sustainability Investing, has launched three new capabilities today covering two asset classes: listed and private equity. All three strategies integrate ESG factors and were presented at RobecoSAM's key annual event, the RobecoSAM Forum.

The best of two worlds: quant investing and ESG integration

The new RobecoSAM Quant Sustainable Global Equities Fund combines two investment disciplines in one product by blending a quantitative investment approach with sustainability analysis and ESG integration. Rainer Baumann, Head of Public Equity and Member of the Executive Committee at RobecoSAM, says: "This investment strategy systematically integrates financially material ESG factors into a quantitative investment process. In this way, it enables investors to generate excess returns at the favorable conditions of a passive product while strengthening their sustainability profile. The strategy is designed for institutional investors seeking a broadly diversified product based on ESG integration with a risk/return profile comparable to that of a classical benchmark." The share class I for institutional investors has ISIN LU1036586912.

Enhanced private equity capabilities in resource efficiency and European mid-market investing

RobecoSAM has strengthened its private equity capabilities in European mid-market investing and resource efficiency related secondary investments. These capabilities include the integration of ESG factors, which RobecoSAM believes improves the overall risk/return profile. The European mid-market capability seeks to benefit from the anticipated recovery and growth of European economies, most notably for mid-sized companies.

"Especially lower mid-market companies provide a unique opportunity for true operational value creation while taking advantage of the recovery of the euro zone," Niels Bardelmeijer, Investment Director at RobecoSAM Private Equity, explains. "Our approach is to achieve operational value creation in terms of sales and margin growth by helping companies to improve their corporate management."

In addition, RobecoSAM Private Equity is strengthening its resource efficiency capabilities. The market for resource efficiency focused strategies has been growing over the last few years. RobecoSAM Private Equity has the investment skills and sector experience needed to evaluate these opportunities efficiently. This has been reflected in favorable conditions for secondary acquisitions in the resource efficiency area. More information can be [found on the website](#).

Michael Baldinger, CEO, RobecoSAM: "The launch of these three capabilities shows our continued drive to innovate and provide our clients with ESG integration across various asset classes."

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Note to editors: For more background information on the RobecoSAM Quant Sustainable Global Equities Fund write us at com@robecosam.com. We can provide the following:

- Factsheet
- Product presentation
- Product brochure

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About RobecoSAM

Founded in 1995, RobecoSAM is an investment specialist focused exclusively on Sustainability Investing. It offers asset management, indices, engagement, voting, impact analysis, sustainability assessments, and benchmarking services. Asset management capabilities cater to institutional asset owners and financial intermediaries and cover a range of ESG-integrated investments (in public and private equity), featuring a strong track record in resource efficiency theme strategies. Together with S&P Dow Jones Indices, RobecoSAM publishes the globally recognized Dow Jones Sustainability Indices (DJSI). Based on its Corporate Sustainability Assessment, an annual ESG analysis of 2,800 listed companies, RobecoSAM has compiled one of the world's most comprehensive databases of financially material sustainability information.

RobecoSAM is a member of the global pure-play asset manager Robeco, which was established in 1929 and is the center of expertise for asset management within the ORIX Corporation. As a reflection of its own commitment to advocating sustainable investment practices, RobecoSAM is a signatory of the UNPRI and a member of Eurosif, ASrIA and Ceres. Approximately 130 professionals work for RobecoSAM, which is headquartered in Zurich. As of December 31, 2013, RobecoSAM had assets under management, advice and/or license in listed and private equity* of approximately USD 10.2 billion. Additionally, RobecoSAM's Governance & Active Ownership team** had USD 74 billion of assets under engagement and USD 51.8 billion of assets under voting.

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