

# Media release

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## Investing along and supporting the UN Sustainable Development Goals (SDGs): **RobecoSAM launches Global Sustainable Impact Equities strategy**

- **Delivers direct and measurable impact by investing in companies that contribute towards achieving the SDGs**
- **Connects financial returns with investors' commitment to advance social, environmental, and economic impact goals**
- **Integrates financial and sustainability analysis along entire investment process**
- **Measures and manages the positive impact of the portfolio**
- **"Founders' share class" offers special management fee**

RobecoSAM, the investment specialist that has focused exclusively on Sustainability Investing (SI) for over 22 years, today announced the launch of the RobecoSAM Global Sustainable Impact Equities strategy (the "strategy"). The strategy's intention is to deliver direct impact and attractive returns by investing in a portfolio of listed companies whose products and services as well as their global operations demonstrably contribute toward the achievement of the SDGs. The strategy is tailored to retail and institutional investors, as well as foundations, that are looking to put their wealth to work in support of the SDGs, create positive and measurable impact, while generating competitive returns.

### **A win-win-win opportunity**

The UN's 2030 agenda for Sustainable Development and its set of [17 SDGs](#) represent a significant step toward re-distributing the responsibility for economic and social progress from public agents to a wider base of stakeholders that include corporations, asset owners, and private investors. The SDGs significantly increase the role of business and of finance in advancing social, economic and human development. In fact, according to the [UNEPFI](#), the achievement of the SDGs will require a flow of USD 5-7 trillion per year until 2030 into relevant solution providers – most of which will need to stem from private finance.

Bringing SDG investing to the space of listed equities securities increases the capital allocated to companies with the expertise, scale, and technology to move the needle significantly toward a more sustainable economy. Investing in the SDGs is a societal imperative, an economic necessity, as well as a great multi-billion opportunity for investors, who are looking to instigate positive, measurable impact while generating competitive returns.

**Rainer Baumann, CFA, Head of Investment Management & Member of the Executive Committee, RobecoSAM:** "SDG investing can be seen as further development of SI, which RobecoSAM has been successfully doing since 1995. In line with our longstanding investment architecture, the RobecoSAM Global Sustainable Impact Equities strategy invests in companies that provide solutions to global challenges and contribute markedly to achieving the SDGs. Because we believe these companies will outperform in the long term, we have created this win-win-win opportunity for society, investors and the companies we have identified as SDG-enablers."

### **A truly integrated investment approach with clear intention**

The starting investment universe for the strategy consists of 5'000 global stocks. Companies are then assessed in detail and rated according to the degree to which they support the SDGs, using the percentage of sales for each business segment, geographic distribution, and an evaluation of the extent to which the company's products or services create impact. Only companies with a measurable and significant impact on one or multiple SDGs are selected for inclusion in the "SDG universe" of approximately 1'000 stocks. RobecoSAM Equity and SI analysts then employ an investment approach based on sustainability, profitability, quality and valuation to select the best stocks. Risk/return profile optimization techniques are applied to the remaining stocks to determine an efficient portfolio of approximately 60-80 stocks.

By combining such a high impact universe with the firm's research into ESG excellency and fundamental research skills, the RobecoSAM Global Sustainable Impact Equities strategy provides a high conviction impact portfolio and aims to outperform broad equity markets by 2-4% (annualized) over a full market cycle.

**Jacob Messina, CFA, Head of Sustainability Investing Research, RobecoSAM:** "We have applied RobecoSAM's collective thematic investing expertise, gained over more than 22 years, to identify and invest in companies that provide solutions to

some of the worlds' greatest challenges. By combining our thematic research with the financially material sustainability information collected via the annual Corporate Sustainability Assessment (CSA), we are able to identify companies that contribute positively to the SDGs, and produce detailed reporting that allows investors to understand the impact of their wealth. The RobecoSAM Global Sustainable Impact Equities strategy meets the growing demand from investors for investment vehicles that not only align with their values, but also seek to deliver meaningful impact in combination with attractive returns."

**Ruben Feldman, CFA, Senior Quantitative Analyst, RobecoSAM:** "With this strategy, we ensure an optimally efficient allocation of capital relative to the risks and opportunities represented by SDG impact investing. Our risk/return profile optimization techniques provide our clients with the best level of return for the lowest possible level of risk."

### Impact measurement and reporting

RobecoSAM's SDG investing offering includes a completely new type of impact reporting. A team of over 20 financial and sustainability analysts have mapped the material impacts of each of the companies in the SDG Universe to specific SDGs, and developed a proprietary set of Key Impact Indicators (KIIs) that demonstrate the value of the SDG contribution. The qualitative SDG impact reporting includes an explanation of the SDG contributions and KIIs. RobecoSAM's quantitative reports show how many companies in the portfolio contribute to specific SDGs, and compares the portfolio to a standard equity benchmark. These impact reporting capabilities are unique and the information is robust, thanks to RobecoSAM's comprehensive database of financially material sustainability information.

### Founders' share class offers special management fee

RobecoSAM is convinced, that any assets invested along the SDGs now are better than assets invested in the SDGs tomorrow. That is why RobecoSAM has created a new "founders' share class", which aligns the interests of RobecoSAM and its clients to create a measurable, immediate and positive impact. Early investors, who commit to the strategy, will not only be investing alongside the strategy's seed money, but will also benefit from a competitive management fee of only 0.5% (TER 0.63%). The exclusive "founders' share class" will close latest after the first EUR 50 million have been entrusted.

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### About RobecoSAM

Founded in 1995, RobecoSAM is an investment specialist focused exclusively on Sustainability Investing. It offers asset management, indices, impact analysis and investing, sustainability assessments, and benchmarking services. The company's asset management capabilities cater to institutional asset owners and financial intermediaries and cover a range of ESG-integrated investments, featuring a strong track record in resource efficiency-themed strategies. Together with S&P Dow Jones Indices, RobecoSAM publishes the globally recognized Dow Jones Sustainability Indices (DJSI) as well as the S&P ESG Factor Weighted Index series, the first index family to treat ESG as a standalone performance factor using the RobecoSAM Smart ESG methodology. Based on its Corporate Sustainability Assessment (CSA), an annual ESG analysis of over 3,900 listed companies, RobecoSAM has compiled one of the world's most comprehensive databases of financially material sustainability information. The CSA data is also included in USD 104 billion of assets under management at Robeco.

RobecoSAM is a sister company of Robeco, the Dutch investment management firm founded in 1929. Both entities are subsidiaries of ORIX Corporation Europe N.V., the center of asset management expertise for ORIX Corporation. As a reflection of its own commitment to advancing sustainable investment practices, RobecoSAM is a signatory of the PRI, UN Global Compact and Climate Action 100+, a supporter of the Task force on Climate-related Financial Disclosure (TCFD), as well as a member of Eurosif, Swiss Sustainable Finance, Carbon Disclosure Project (CDP), and Portfolio Decarbonization Coalition (PDC). As of June 30, 2017, RobecoSAM had client assets under management, advice and/or license of approximately USD 19.3 billion.

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