

# Media Release

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## **RobecoSAM Launches Annual Dow Jones Sustainability Indices Company Evaluation**

- **Over 3,400 of world's largest companies invited to complete Corporate Sustainability Assessment**
- **Evaluation of corporate sustainability practices serves as basis for construction of prestigious DJSI World**
- **Introduction of XBRL reporting addresses increasing "reporting burden" for participating companies**

RobecoSAM, the investment specialist focused exclusively on Sustainability Investing (SI), today launched its Corporate Sustainability Assessment (CSA), the annual evaluation of corporate sustainability practices that serves as the basis for the construction of all Dow Jones Sustainability Indices (DJSI).

Each year, RobecoSAM invites over 3,400 of the largest companies in terms of free float market capitalization from all industries to participate in the CSA. This includes 800 companies from emerging markets that are invited to participate and gain eligibility for inclusion in the *DJSI Emerging Markets*. Following the assessment, companies whose sustainability performance ranks them among the top 10% in their industry are selected for the *DJSI World*, the gold-standard benchmark for corporate sustainability.

### **RobecoSAM's approach to measuring corporate sustainability**

The [CSA](#) focuses on companies' long-term value creation, with more than 100 questions on financially material economic, environmental, social and corporate governance practices. Over half of all questions are industry-specific as RobecoSAM is convinced that industry-specific sustainability risks and opportunities play a key role in a firm's long-term success. The other half includes questions on general sustainability issues such as corporate governance, climate strategies and human capital development.

**Daniel Wild, Head of SI Research & Development, RobecoSAM:** "We strongly encourage companies to participate in the 17<sup>th</sup> edition of the CSA. Going through this exercise helps companies to identify financially material sustainability issues that impact their bottom line. Sustainability issues dramatically change companies' competitive environment. Ultimately, companies that consider the effects of sustainability issues on their business will gain a competitive advantage over their peers."

### **XBRL reporting: Lessening the reporting burden**

The CSA process and interface have continuously been refined over the years. This year, RobecoSAM has taken significant steps toward lessening the reporting burden for participants by collaborating with leading software providers CREDIT360 and Workiva to introduce a software API that allows reporting companies to transfer the required data from their information management platforms into the RobecoSAM CSA.

RobecoSAM developed the API based on XBRL (eXtensible Business Reporting Language), the open international standard for digital business reporting. The newly created "taxonomy", a coded representation of all 59 industry-specific CSA questionnaires, will allow companies and software providers to integrate the CSA questionnaire into their corporate reporting systems and processes. RobecoSAM's XBRL Taxonomy was developed in close cooperation with XBRL experts from Workiva.

This development will not only reduce the time and resources needed to complete the assessment but it will also provide a consistent approach to transmitting sustainability information digitally, thereby improving the overall quality of the data.

**Manjit Jus, Head of Sustainability Application & Operations, RobecoSAM:** “The increasing number of corporate sustainability assessment and rating frameworks poses a growing challenge for companies. We are proud to be a pioneer in collecting sustainability information in this way and we hope that an increasing number of companies will use digital reporting to improve the reusability, comparability and overall quality of sustainability information.”

#### **What is the benefit of participating in RobecoSAM’s CSA?**

Many companies that participate in the CSA use their assessment as an internal management tool to identify gaps and initiate improvements in their business practices. Firms that participate in the CSA also receive a free Company Benchmarking Scorecard that compares their sustainability performance to that of their industry peers. In addition, based on the CSA results, sustainability leaders are selected for the DJSI. Inclusion in this highly regarded global sustainability benchmark can enhance a company’s reputation and provide eligibility for DJSI-based investment portfolios.

**To learn more about the annual Dow Jones Sustainability Indices company evaluation, please go to:**

- [DJSI 2015 Assessment Introductory Webinar](#)
- [Sustainability Indices Website](#)

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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 2,900 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 June 30, 2014, RobecoSAM had assets under management, advice and/or license in listed and private equity\* of approximately USD 10.7 billion. Additionally, RobecoSAM’s Governance & Active Ownership team\*\* had USD 85.1 billion of assets under engagement and USD 53 billion of assets under voting. RobecoSAM USA is an investment adviser registered in the US.

### **About CRedit360**

CRedit360 provides companies with a 360-degree view of EHS, Compliance, Energy and Carbon, Corporate Social Responsibility and Supply Chain information. Our integrated software solution empowers companies to accurately capture, manage, and report the sustainability and EHS information needed to ensure compliance and drive performance across all business areas. Headquartered in Cambridge UK, with offices in the United States and New Zealand, CRedit360 serves over 200 clients including McDonald's, Philips, Staples, and British Airways, and is a recognized leader and innovator in sustainability & EHS management solutions. CRedit360 was recently named as a global leader in both sustainability management software and EHS software by independent analyst firm Verdantix. For further information, please visit [credit360.com](http://credit360.com).

### **About Workiva**

Workiva created Wdesk, a cloud-based platform for enterprises to collect, manage, report and analyze business data in real time. Wdesk includes a sophisticated productivity suite for business data collaboration and reporting that is used by thousands of corporations, including more than 65 percent of the Fortune 500. Wdesk proprietary word processing, spreadsheet and presentation applications are fully integrated and built upon the Workiva data management engine. Wdesk helps reduce enterprise risk and increase productivity with synchronized data, controlled collaboration, granular permissions and a full audit trail. This gives users confidence to make decisions with real-time data. Workiva (NYSE: WK) employs more than 950 people with offices in 15 cities. The company is headquartered in Ames, Iowa. For more information, visit [workiva.com](http://workiva.com).

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