

# Media Release

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## **New study from RobecoSAM: Pension fund members in Switzerland are calling for sustainable investment strategies**

- Pension fund members in Switzerland are interested in how and where the pension fund invests their money
- The overwhelming majority (72%) of the insured members are calling for more sustainable investment strategies from their pension funds<sup>1</sup>
- 79% of the pension fund members believe that sustainable investment strategies lead to better long-term investment decisions

RobecoSAM, the investment specialist focused exclusively on Sustainability Investing, asked members of pension funds in Switzerland whether they are interested in their pension fund's (PF) investment strategy and whether they want their PF to pursue a sustainable approach to investment. A representative study was conducted by gfs-zurich, Market & social research AG from May to June 2014 of over 1,200 pension fund members from each of Switzerland's diverse language regions.

### **Swiss want to know how and where their PF money is invested**

PF members in Switzerland are interested in how and where their funds will be invested. More than half (52%) want to know how their pension money is invested. However, the level of interest is not equal in all parts of the country. For example, 56% of those surveyed in the German-speaking region of Switzerland are concerned about which the companies and governments their pension fund is invested in, whereas only 45% of those in the French-speaking region are concerned and just 29% in the Italian-speaking region.

### **Pension funds should have more sustainable investment strategies**

72% of the PF members in Switzerland believe that their PF should also take account of financially material ESG factors when making investments. A look at the various parts of the country and income distribution reveals a different picture. The desire for giving increased consideration to ESG criteria in the investment of funds is greatest amongst those in the German-speaking region of Switzerland, with 78% in favor. In the French-speaking region 65% of respondents also support this idea, while only 39% in the Italian-speaking region support it.

With regards to income distribution, the gap is not as big. 59% of lower income respondents (incomes of less than CHF 4,000 per month) calling for sustainable investment from the PFs is less pronounced than in the higher income categories. 72% of respondents with a monthly income of more than CHF 7,000 agree that the PF should also take account of financially material ESG factors in their investments.

### **Sustainable investing leads to more prudent and better investment decisions**

76% of those surveyed believe that it is important for their PF to conduct a more comprehensive analysis of the investments with the help of a detailed examination based on ESG criteria. 73% of the respondents are of the opinion that sustainable investment strategies lead to more prudent investment decisions and 79% believe it leads to better long-term investment decisions. These statements are supported by all population groups to a similar degree, with almost unanimous support (93%) amongst the population in Southern Switzerland.

<sup>1</sup> For RobecoSAM, sustainable investment strategies are generally all investments that take systematic account of the financial aspects arising from the Environmental, Social & Governance areas (also known by the acronym ESG) within the investment process. ESG criteria describe for example a company's ability to increase its resource efficiency, ensure health and safety in the workplace or to operate a risk and crisis management system. For additional, specific examples of financially-relevant ESG criteria go to: <http://www.robecosam.com/images/overview-esg-criteria.pdf>

### Investment preferences of the PF members in Switzerland

When asked about the specific objectives for their own pension contributions and a sustainable investment strategy, respondents specified particular sectors and themes. According to the survey, respondents believe pension funds should invest in companies that offer solutions to global challenges such as:

- Water scarcity (75%)
- Food scarcity (74%)
- Energy shortages (69%)
- Availability of raw/basic materials (63%)

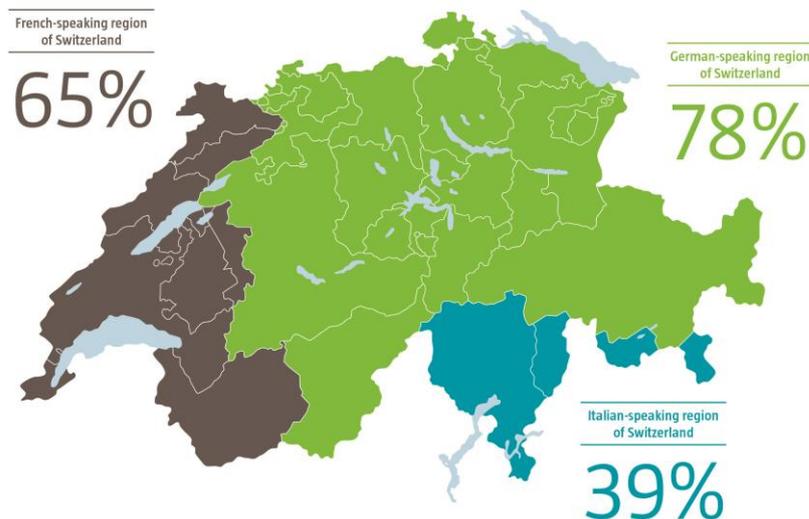
However, respondents feel pension funds should not invest in the following countries, sectors, and/or companies:

- Countries which breach human rights (86% of those surveyed are against investing in these)
- Sectors that are generally controversial (85%)
- Companies that fail to provide protection for their employees (84%)
- Companies that fail to abide by guidelines on environmental protection (83%)
- Companies that fail to abide by guidelines on the rights of shareholders and owners (76%)

82% of those surveyed also believe that by taking the aforementioned investment strategies into account pension funds are also meeting their social responsibilities.

**Michael Baldinger, CEO, RobecoSAM:** *“The mandate from pension fund members is clear: 72% of the PF members surveyed in Switzerland want their pension fund to consider financially material ESG factors in their investments. PF members are also convinced that the inclusion of ESG criteria leads to more prudent and better long-term investment decisions. These are the same views our company was founded on and we continue to work closely with pension funds to serve their sustainable investing needs with sophisticated solutions.”*

Infographic: Support amongst Swiss PF members for their pension funds taking account of financially material ESG factors in their investments, with a breakdown according to the various language regions.



*Infographic 1: Support amongst Swiss PF members for their pension funds taking account of financially material ESG factors in their investments, with a breakdown according to the various language regions.*

German-speaking region of Switzerland: 78% / French-speaking region of Switzerland: 65% / Italian-speaking region of Switzerland: 39%

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The documents related to the study can be found here:

<http://www.robecosam.com/en/media/download-site-pensionskasse-esg-integration.jsp>

Interesting and entertaining Sustainability Investing videos on YouTube via:

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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.

**About gfs-zurich, Market & social research**

The institute of research gfs-zurich can call on 50 years' experience in market and social research. Thanks to its long-standing experience and interconnection with groups from the world of science and industry, gfs-zurich enjoys an excellent reputation in Switzerland as a high quality market research institute. In addition to projects which address current social issues, the work of the institute also focuses on high-volume and high quality, customized, client-based surveys. Client and employee surveys, image and position analyses, motivation research, advertising impact research are considered proven strengths in terms of methodology, with gfs-zurich being engaged in areas such as industry, finance, education, healthcare, retirement as well as the non-profit market.

For further information go to [www.gfs-zh.ch](http://www.gfs-zh.ch)

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