

Swiss Sustainable Investment Market Report 2017

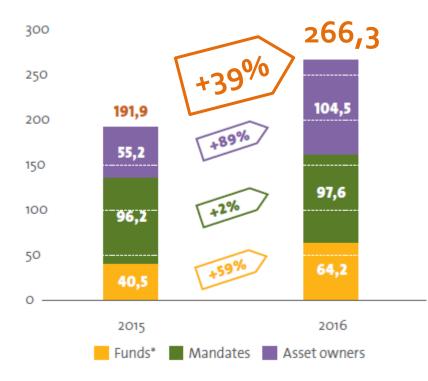
Kelly Hess, Swiss Sustainable Finance

13 June 2017



Total volume of sustainable investments in Switzerland (as of December 2016)

(in CHF billion)

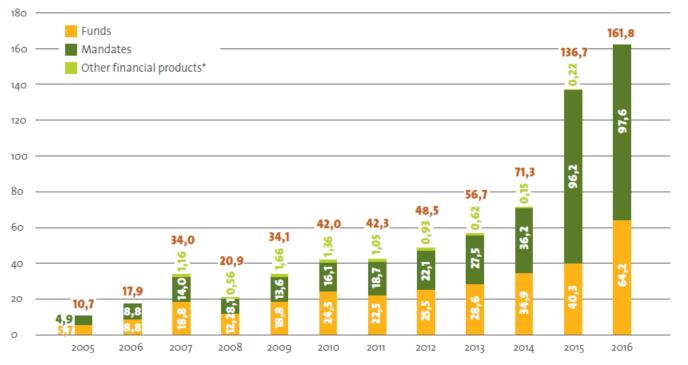


^{*} The fund figure for 2015 also includes other financial products



Total volume of sustainable funds and mandates in Switzerland (as of December 2016)

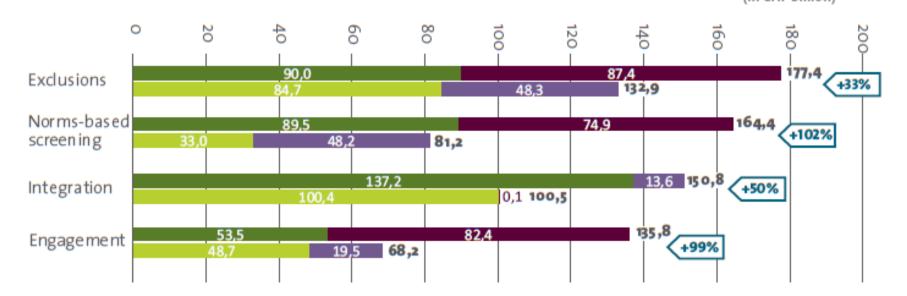
(in CHF billion)



* As of 2016, "Other financial products" will not be reported separately



Most prominent sustainable investment strategies with high growth rates



2016 Asset managers

2016 Asset owners

2015 Asset managers

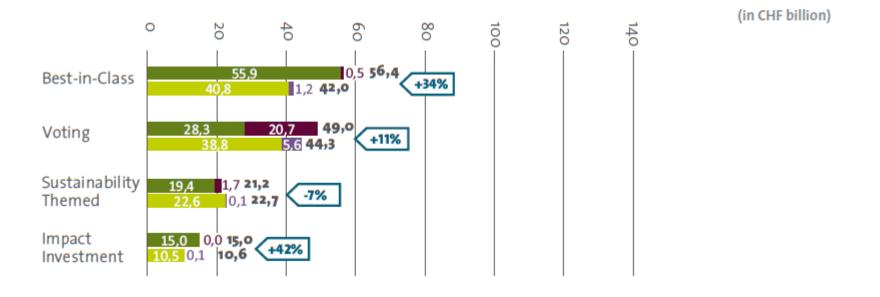
2015 Asset owners

Data: Forum Nachhaltige Geldanlagen / Swiss Sustainable Finance 2017

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More "traditional" strategies with lower volume and growth rates



2016 Asset managers

2016 Asset owners

2015 Asset managers

2015 Asset owners



Top 10 exclusion criteria applied in Switzerland (for respective volume in billion CHF)

1.	Violation of human rights	130,2	
2.	Violation of labour rights	111,2	
3.	Corruption and bribery	109,4	Norms- based
4.	Environmental destruction	105,5	
5.	Weapons (production and trade)	90,0	
6.	Tobacco	80,0	
7.	Pornography	66,2	Values-
8.	Nuclear power	61,3	based
9.	Genetic engineering	58,9	
10.	Gambling	48,9	

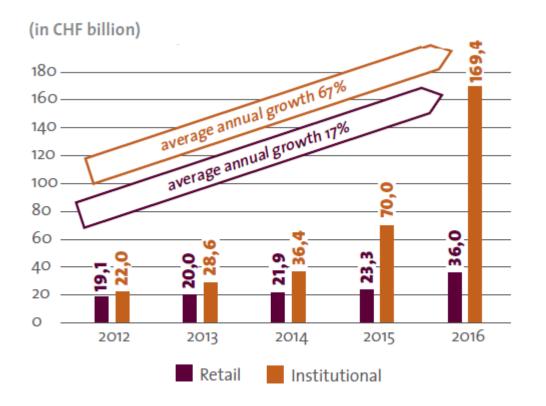


Most important engagement topics in 2016

1.	Corporate governance
2.	Climate change (risks, GHG emissions disclosure, targets, strategy, measures)
3.	Business ethics
4.	Supply chains
5.	Human rights



Distribution of funds amongst different types of investors



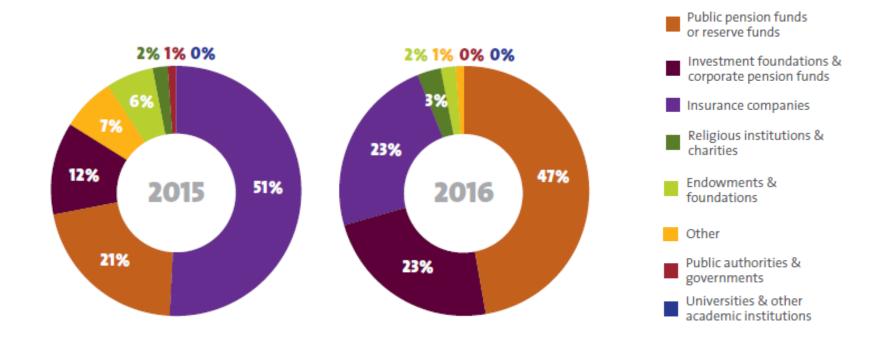
Share of institutional investors grew to 82% (from 75% in previous year)

Data: Forum Nachhaltige Geldanlagen / Swiss Sustainable Finance 2017

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Types of institutional investors in Switzerland





Conclusion and outlook

- With growth of 39%, the sustainable investment market again shows considerable growth
- Sustainable funds now account for 7% of Swiss fund market
- Growing importance of institutional investors brings strong growth in «mainstream approaches»
- We expect to see further adoption of sustainable investment approaches by pension funds and foundations
- In private wealth management, best-in-class approaches in combination with exclusions, as well as, thematic and impact investing are key
- What we see here is just the start of this development



Thank you for your attention!



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Sustainable Investment market data in the DACH-Region

Volker Weber – President FNG, Forum Nachhaltige Geldanlagen

Bern, 13th June 2017



Forum Nachhaltige Geldanlagen

FNG – Forum Nachhaltige Geldanlagen e.V.

- Industry association promoting sustainable investment in Germany, Austria, Switzerland and Liechtenstein
- Founded in 2001, headquartered in Berlin
- More than 170 members (June 2017), thereof banks, asset management firms, financial advisors, rating agencies, insurance companies, scientific research institutions and NGOs
- Member of the europewide SIF-network Eurosif
- Key mission: information of the public regarding sustainable investments, active fostering of sustainable and transparent investment products
 Claudia Tober – Executive Director





GLOBAL SUSTAINABLE INVESTMENT ALLIANCE 🐝 GSIA



Source: http://www.mygeo.info/landkarten/europa/clipart_kontinent_europa.png



Transparency and quality standards

• European Transparency Code (since 2008)



• FNG Label in cooperation with the project partner and auditor Novethic (since 2015)







SIEGE

auditiert durch Novethic

CFNG FORUM NACHHALTIGE GELDANLAGEN





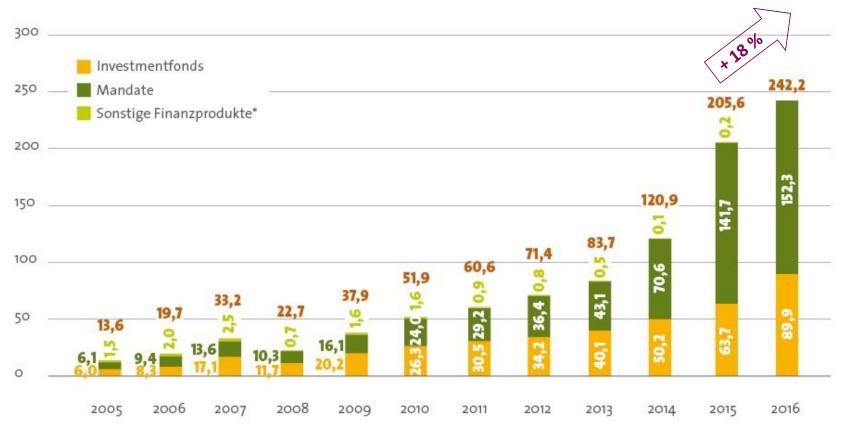
Sustainable investment market in Germany, Austria and Switzerland



*Die Investmentfonds beinhalten auch die strukturierten Finanz-produkte aus der Schweiz. Daten: Forum Nachhaltige Geldanlagen



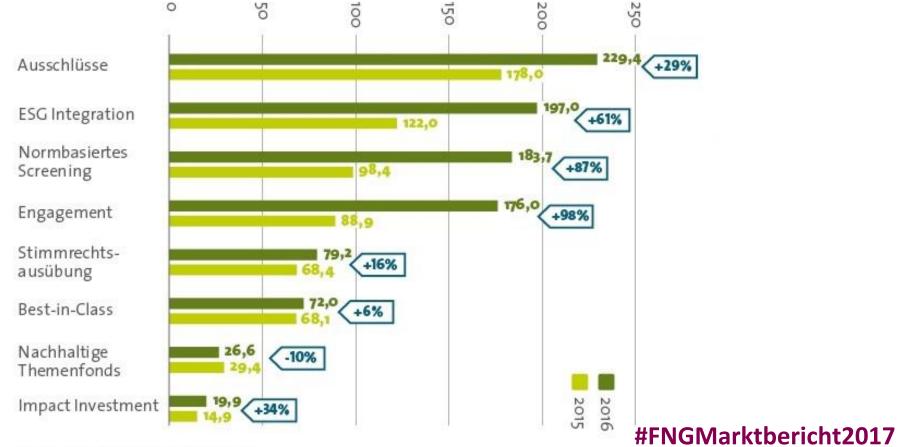
Sustainable investment funds and mandates (in € billion)



*Seit 2016 werden "Sonstige Finanzprodukte" nicht mehr gesondert erhoben Daten: Forum Nachhaltige Geldanlagen



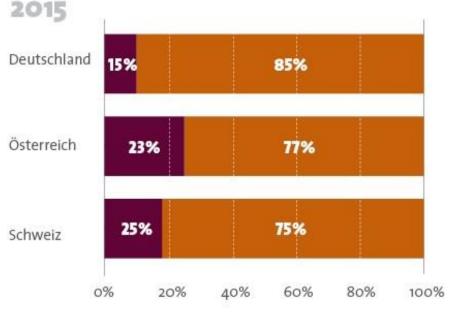
Sustainable investment approaches as of end of year 2015 and 2016 (in € billion)



Daten: Forum Nachhaltige Geldanlagen

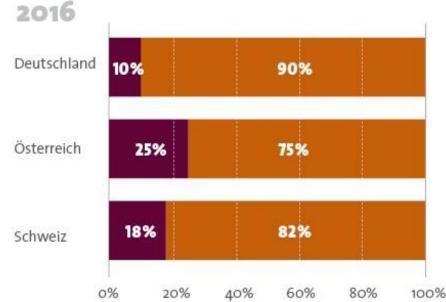


Distribution of investor types in 2015 and 2016 (in per cent)



[📕] Private Investoren 🛛 📕 Institutionelle Investoren

Daten: Forum Nachhaltige Geldanlagen



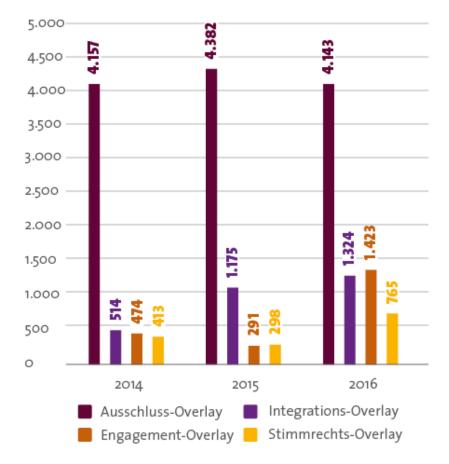
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Asset Overlays

Since 2014, the following investment strategies have also been recorded product-independently as asset overlays: exclusions, engagement, voting and integration

Total Asset Overlays: 4,1 € trillion

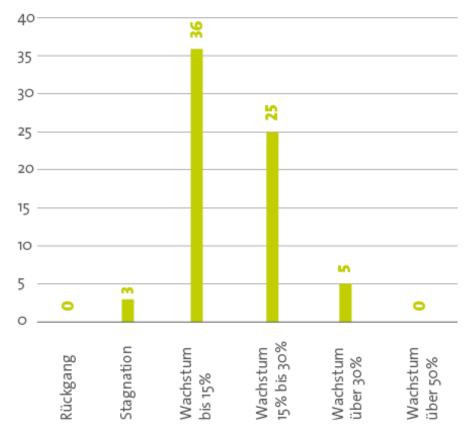
- € 4.1 trillion luster munitions and antipersonnel mines
- € 2.3 trillion Billionen weapons of mass destruction
- € 652.9 billion speculation in foodstuffs
- € 571.1 billion coal



Daten: Forum Nachhaltige Geldanlagen



Growth forecasts for sustainable investments in 2017



Daten: Forum Nachhaltige Geldanlagen





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