



# The role of sustainable investors in promoting CSR and SDGs

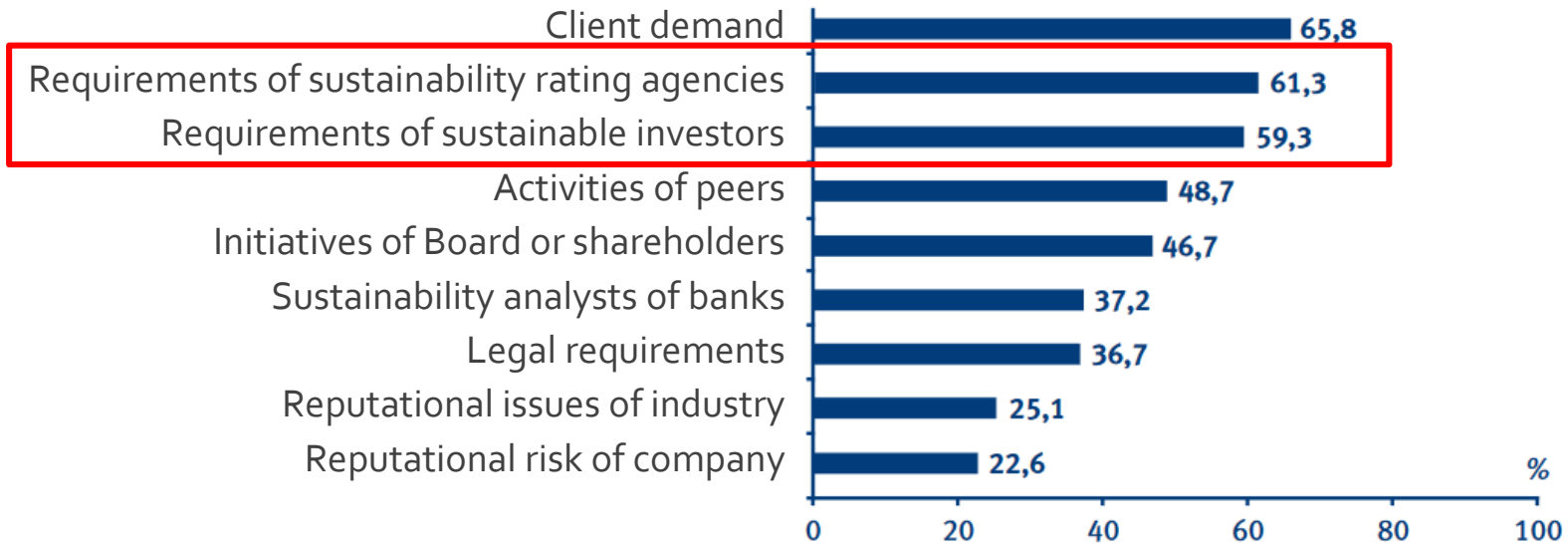
Sabine Döbeli, CEO Swiss Sustainable Finance

Global Compact Network Switzerland, 2 February 2017

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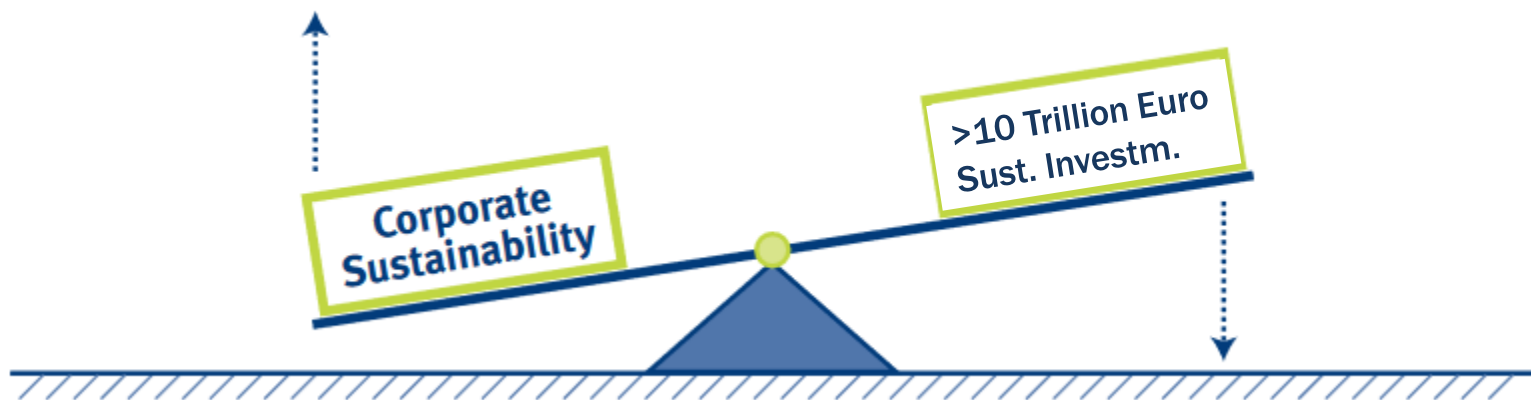
## Survey amongst listed companies on drivers for CSR

Which factors were important or very important for the decision of your company to actively address sustainability issues?



Source: oekom research 2013

## Influence of sustainable investors as relevant factor for CSR strategies of companies



Source: oekom research 2013

## Three main motivations for sustainable investing

Align investments with international/national norms or specific values of organisation

Improve risk/return profile of investments

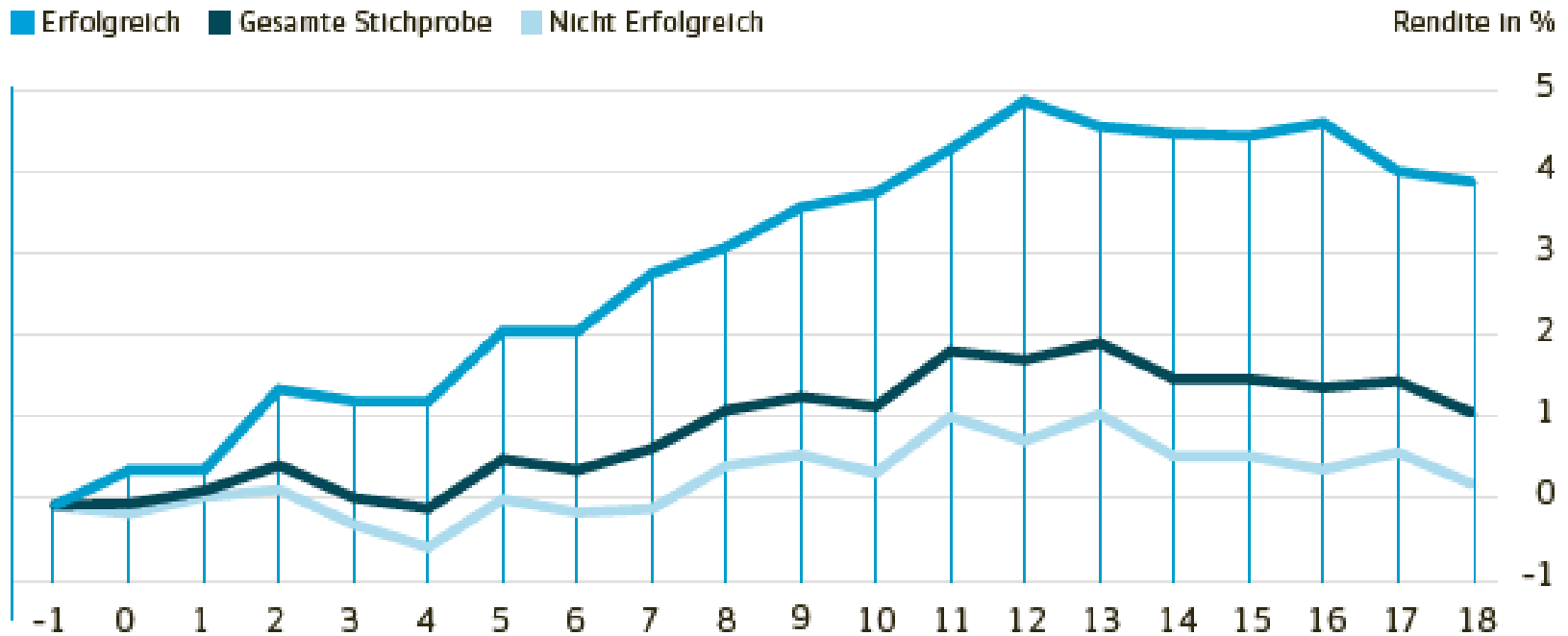
Foster a long-term sustainable economy and society

## Different sustainable investment approaches with differing forms of influence

Before investment decision	After investment decision
<p><b>Exclusions</b></p> <ul style="list-style-type: none"> <li>– Values based (i.e. Tobacco)</li> <li>– Norms based (i.e. cluster bombs)</li> </ul> <p><b>Positive screening</b></p> <ul style="list-style-type: none"> <li>– Best-in-class</li> <li>– Thematic investments (i.e. Cleantech, Microfinance)</li> </ul> <p><b>ESG Integration</b></p> <ul style="list-style-type: none"> <li>– Environmental, Social, and Governance-Criteria (ESG) integrated in investment process</li> </ul>	<p><b>Engagement</b></p> <ul style="list-style-type: none"> <li>– Active dialogue with corporates on ESG topics</li> </ul> <p><b>Proxy Voting</b></p> <ul style="list-style-type: none"> <li>– Actively using stakeholder voting rights</li> </ul>

## Engagement adds value

Cumulative abnormal return relative to first sustainability engagement



Ereignisfenster

Quelle: Dimson et al (2012)

Dimson et al (2012) found a positive abnormal return over a 12-month period after an initial engagement, much higher for successful engagements (4.4%) and most significant for governance and climate change issues.

## Investments for Development: direct investments to foster economies in emerging and developing markets

- First market survey on Investments for Development
- Market size and growth:
  - CHF 10 billion; 1/3 of global market
  - CAGR 18.4% in 2015
- Microfinance approx. 80%
- Four case studies:
  - BlueOrchard, Obviam, responsibility, Symbiotics



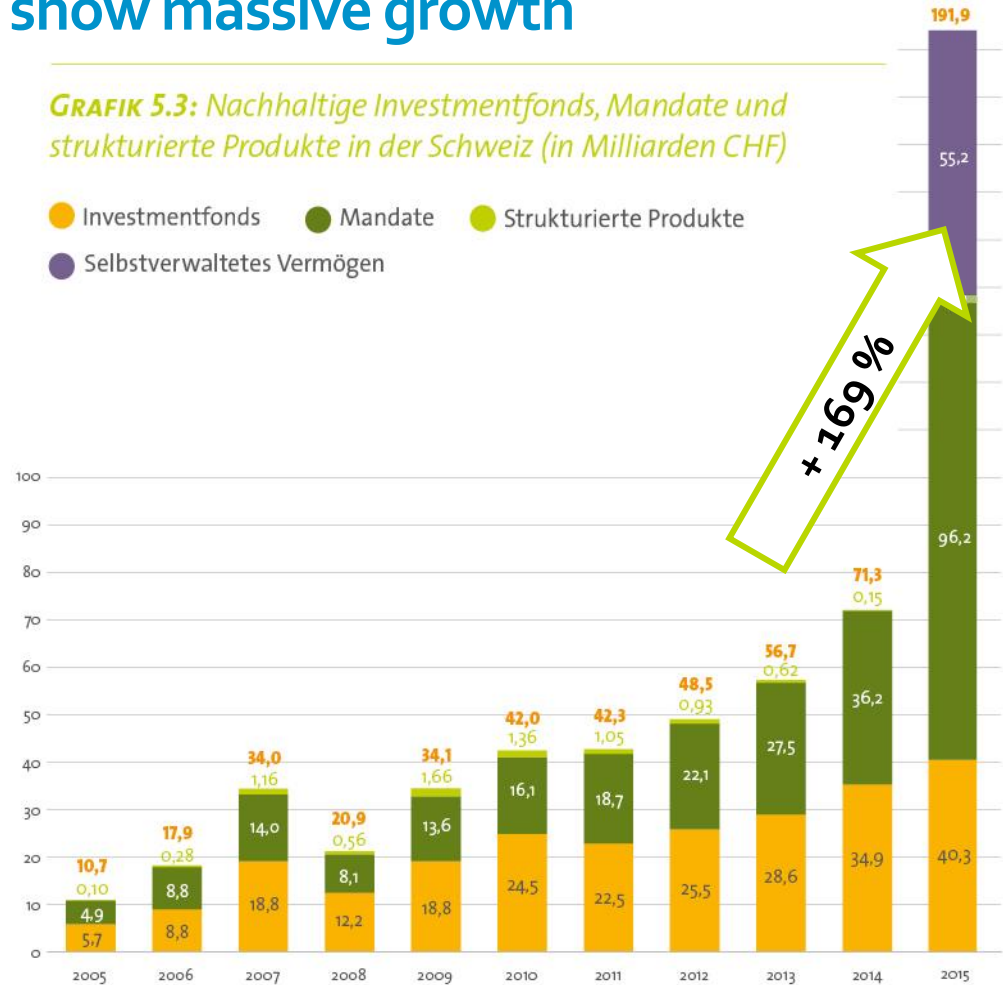
Source: Swiss Sustainable Finance, (2016) *Investments for a Better World. The First Market Survey on Investments for Development*.

# Sustainable Investments show massive growth

## CHF 191.9 Bn (2015)

**GRAFIK 5.3:** Nachhaltige Investmentfonds, Mandate und strukturierte Produkte in der Schweiz (in Milliarden CHF)

- Investmentfonds
- Mandate
- Strukturierte Produkte
- Selbstverwaltetes Vermögen

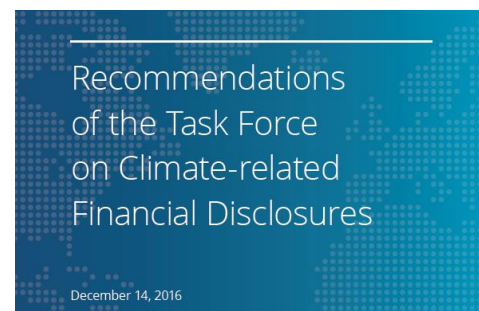


Data: Forum Nachhaltige Geldanlagen / Swiss Sustainable Finance



## Sustainable Finance on agenda of international regulators

- UNEP Inquiry presents action points for sustainable financial system
- TCFD of FSB presents report on climate-related financial disclosure
- G20 workgroup on green finance presents recommendations
- EU establishes expert group on sustainable finance





## Contact

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