

Press release

Study by Swiss Sustainable Finance confirms: Swiss institutions manage around a third of global investments for development

Zurich, 12 April 2016

Swiss financial institutions manage around USD 10 billion of worldwide investments for development, equivalent to almost one third of the total global volume¹. The study 'Swiss Investments for a Better World' identifies microfinance and investments for development as a rapidly expanding area of Switzerland's financial industry, with an impressive growth rate of 18.4% over the past year. The financial sector is therefore building a bridge between economically disadvantaged regions seeking access to financial solutions and investors aiming for a market return on their long-term investments.

Comprehensive study of a growing market segment

The first Swiss Sustainable Finance study, 'Swiss Investments for a Better World', offers a detailed overview of the structure and dynamics of the Swiss market for investments for development. Switzerland has a well-established and strong track record in fostering development in less privileged countries, be it through public-sector activities, NGO work or – over the past few years – through channelling private funds into developing countries. The report was produced in partnership with the Center for Microfinance of the University of Zurich² and Symbiotics³. The survey of asset managers, banks and institutional investors made it possible to analyse the asset allocation (incl. the structure of the portfolios), the investment characteristics (currencies, portfolio quality, regional allocation and socio-economic and environmental indicators), as well as the financial returns (incl. risk and liquidity). The report also presents four case studies showcasing innovative approaches to the financing of education, agriculture, and SMEs in different sectors in developing countries. Funding for the study was supplied by responsAbility Investments and SIFEM as gold sponsors, as well as from alphamundi, BlueOrchard and LGT as silver sponsors.

Institutional investors are the main driving force

Investments for development aim for a double benefit: on the one hand they contribute to the long-term fight against poverty in developing countries, while at the same time providing opportunities for

¹ Status: 30 September 2015

² The market survey was compiled by the Center for Microfinance, University of Zurich

³ Symbiotics provided the technical know-how and data collection software

investors to achieve consistent market returns in a challenging economic environment. The majority of the investments (40%) originate from institutional investors, followed by public institutions (30%), retail investors (20%) and high net worth individuals (10%). Swiss investments for development flow into 96 different countries and at least 15 sectors, with a large portion channelled into microfinance.

Sabine Döbeli, CEO of Swiss Sustainable Finance, explains the role of such investments as follows: "Investments in development are a crucial tool for realising the UN's ambitious goals in the area of sustainable development. At the same time, they meet growing customer demand from both institutional and retail investors."

Jean-Daniel Gerber, President of Swiss Sustainable Finance, adds: "Thanks to many years of experience in this area, the Swiss financial market offers exactly the right conditions for meeting rising investor demand. A stable regulatory, economic and political framework provides the ideal environment for this."

The findings of the study will be presented at a special event on 12 April in Geneva, "Swiss investments for development contributing to a sustainable world", followed by a panel discussion with experts from UNCTAD, ICRC and Lombard Odier. More information on the event can be found [here](#).

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Additional information:

- > Swiss Sustainable Finance study '[Swiss Investments for a Better World](#)'
- > [Charts](#) relating to the topic
- > [SSF newsletter](#) twice a month
- > [Twitteraccount @SwissSustFin](#)
- > [LinkedIn account Swiss Sustainable Finance](#)

Swiss Sustainable Finance (SSF) strengthens the position of Switzerland in the global marketplace for sustainable finance by informing, educating and catalyzing growth. The association, founded in 2014, has representation in Zurich, Geneva and Lugano. Currently SSF unites 88 members and network partners from financial service providers, investors, universities and business schools, public sector entities and other interested organisations. An overview of Swiss Sustainable Finance's current members and network partners can be found [here](#).