

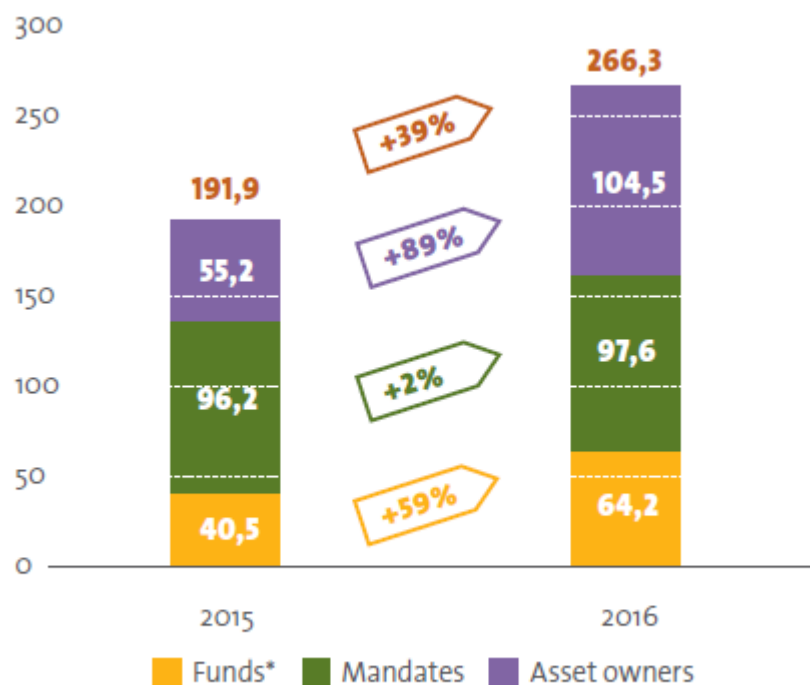
Swiss Sustainable Investment Market Report 2017

Sabine Döbeli, CEO Swiss Sustainable Finance

1 June 2017

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

(in CHF billion)

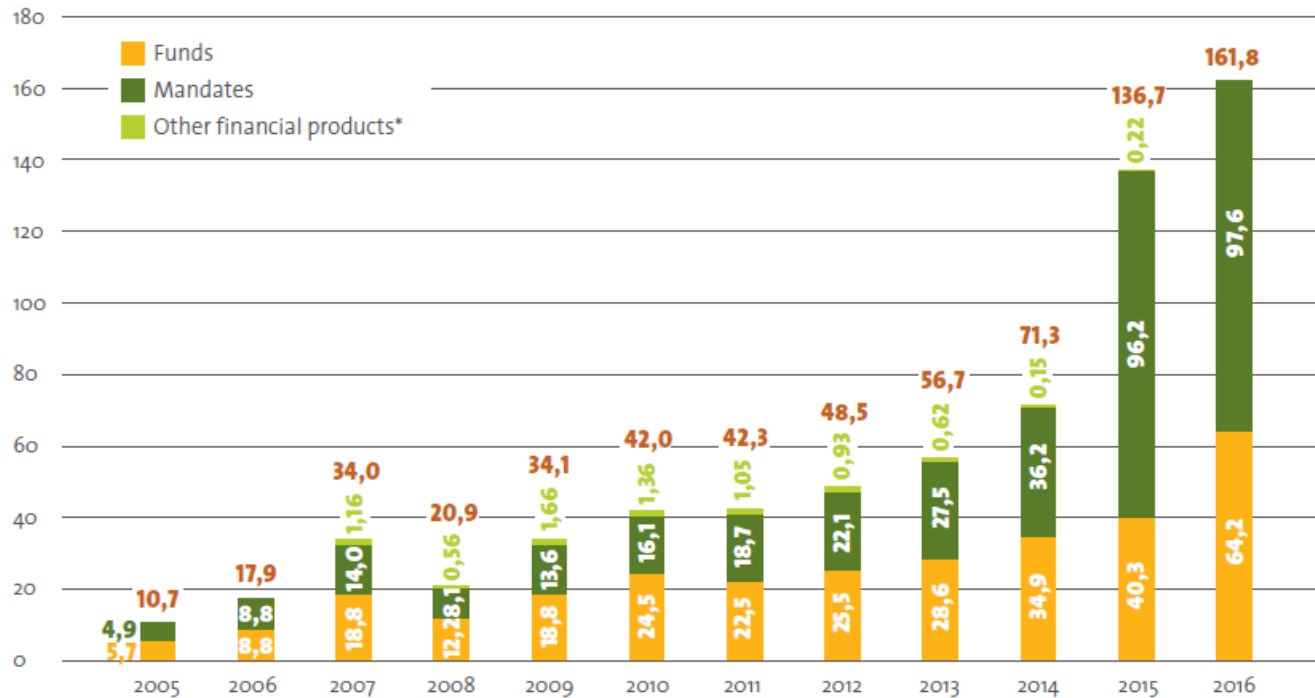


* The fund figure for 2015 also includes other financial products

Data: Forum Nachhaltige Geldanlagen / Swiss Sustainable Finance 2017

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

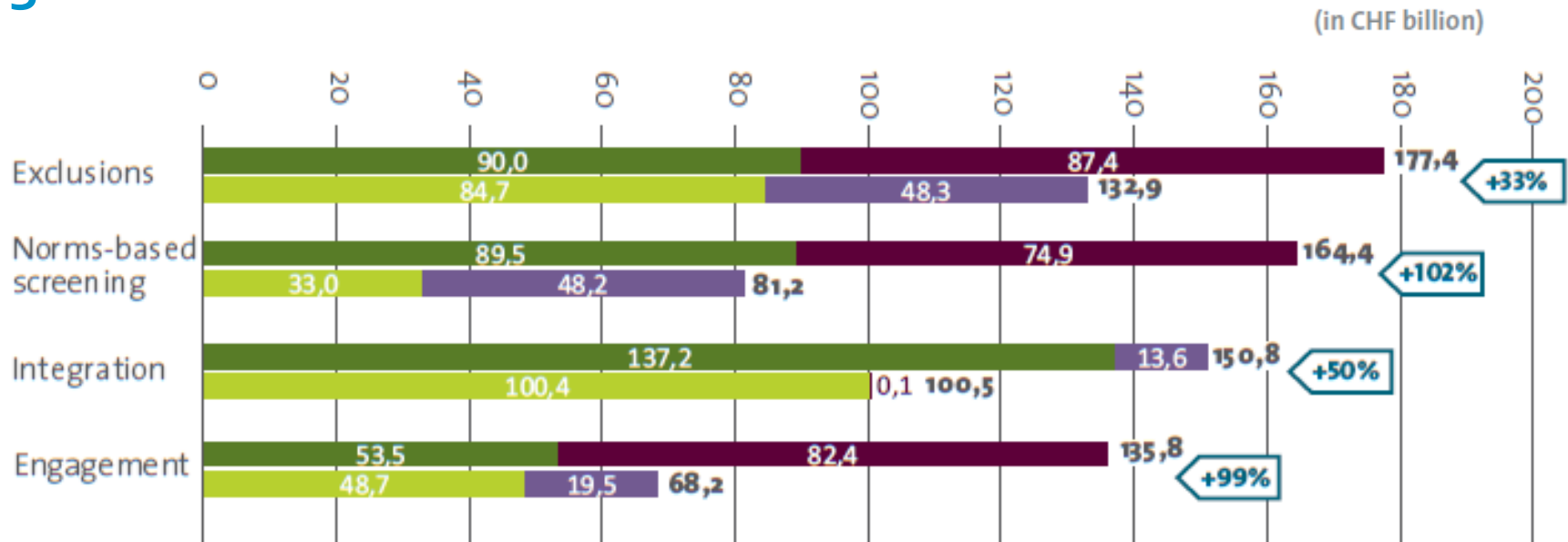
(in CHF billion)



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

Data: Forum Nachhaltige Geldanlagen / Swiss Sustainable Finance 2017

Most prominent sustainable investment strategies with high growth rates

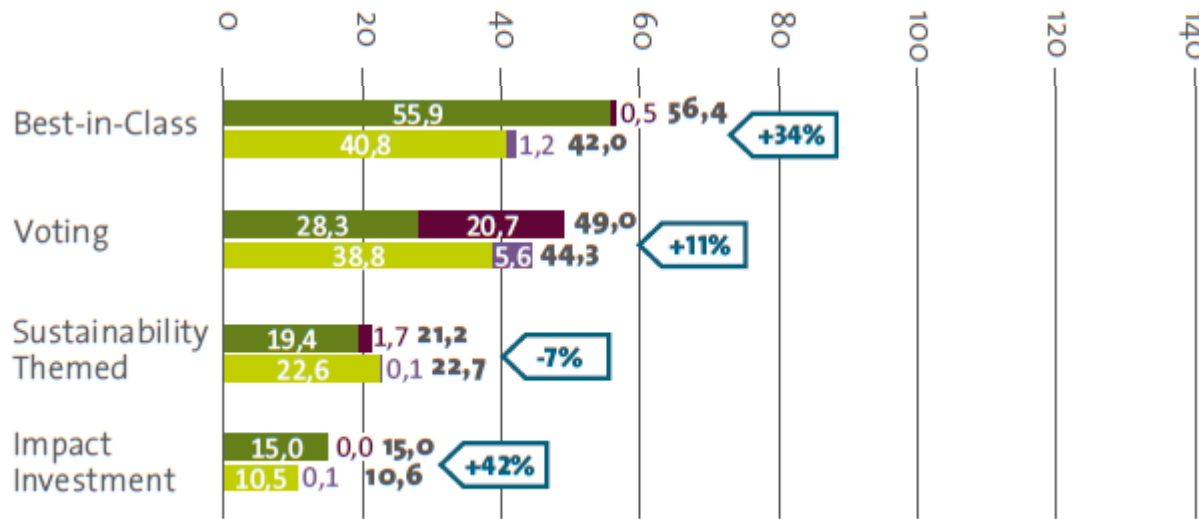


- 2016 Asset managers
- 2016 Asset owners
- 2015 Asset managers
- 2015 Asset owners

Data: Forum Nachhaltige Geldanlagen / Swiss Sustainable Finance 2017

More „traditional“ strategies with lower volume and growth rates

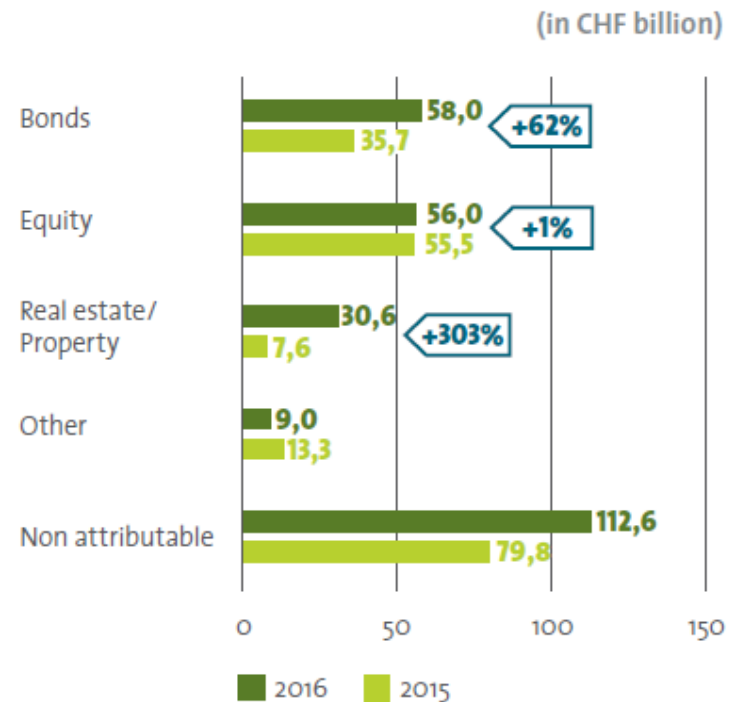
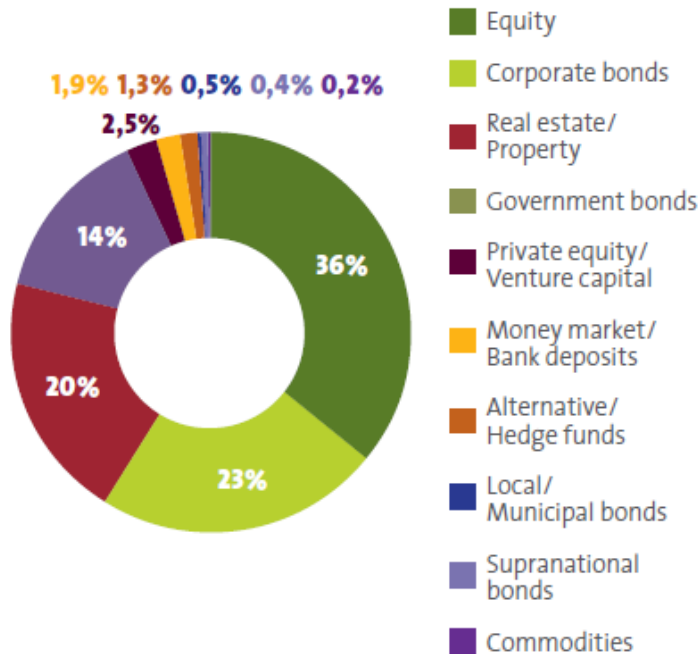
(in CHF billion)



- 2016 Asset managers
- 2016 Asset owners
- 2015 Asset managers
- 2015 Asset owners

Data: Forum Nachhaltige Geldanlagen / Swiss Sustainable Finance 2017

Share of different asset classes and change vs. previous year



Data: Forum Nachhaltige Geldanlagen / Swiss Sustainable Finance 2017

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
4.	Environmental destruction	105,5
5.	Weapons (production and trade)	90,0
6.	Tobacco	80,0
7.	Pornography	66,2
8.	Nuclear power	61,3
9.	Genetic engineering	58,9
10.	Gambling	48,9

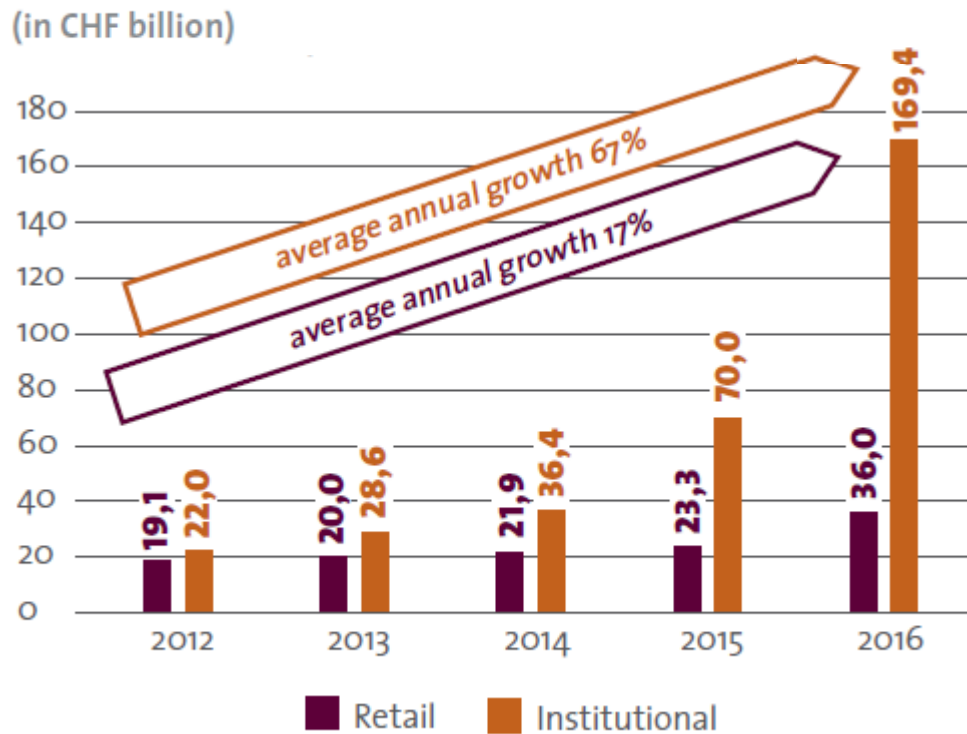
*Data: Forum Nachhaltige Geldanlagen /
Swiss Sustainable Finance 2017*

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
6.	Environmental management system & reporting
7.	Environmental impact of investments / products and services
8.	Environmental controversies
9.	Employment
10.	Community involvement

*Data: Forum Nachhaltige Geldanlagen /
Swiss Sustainable Finance 2017*

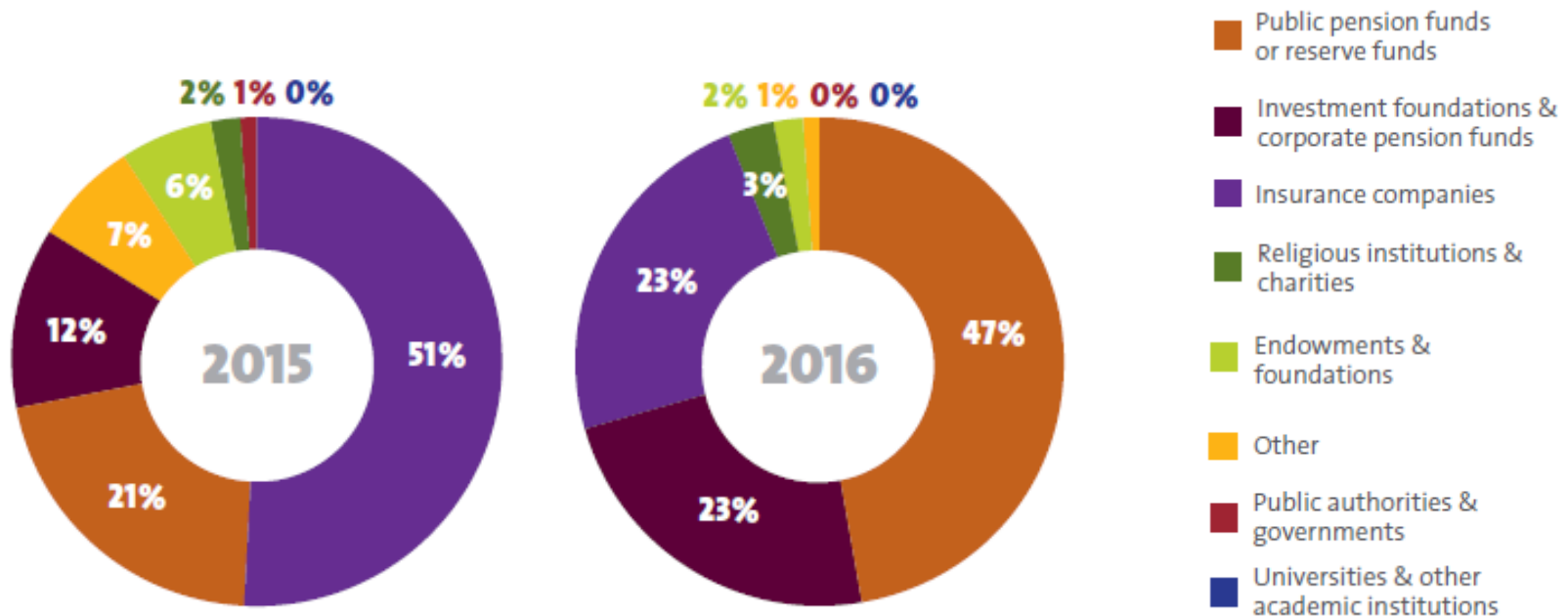
Distribution of funds amongst different types of investors



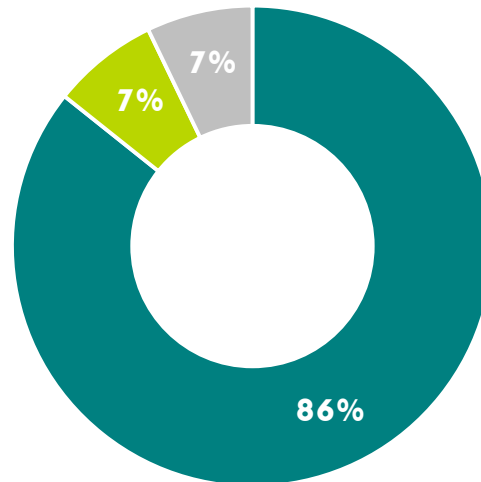
Share of institutional investors grew to 82% (from 75% in previous year)

Data: Forum Nachhaltige Geldanlagen / Swiss Sustainable Finance 2017

Types of institutional investors in Switzerland

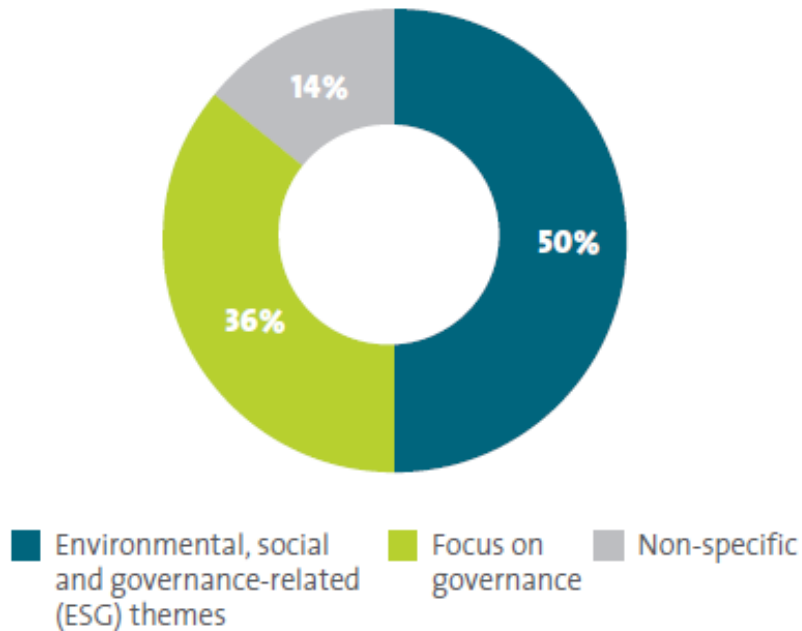


Asset Owners with growing importance for sustainable investment market



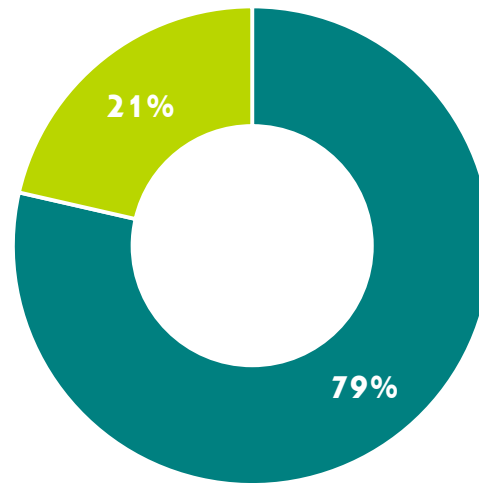
- Responsible investment guidelines in place
- Responsible investment guidelines being prepared
- No responsible investment guidelines

Voting is based on policy and also applies to foreign equities



- All asset owners have voting policy in place. Half of these policies refer to ESG aspects.
- 8 of the 14 asset owners exercise their voting rights for foreign stocks.
- 4 asset owners do so for over 50% of their foreign equity investments.

Engagement policies in place for majority of respondents



■ Engagement policy in place ■ No engagement policy

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 thematic and impact investing are key
- What we see here is just the start of this development



Thank you for your attention!

Contact

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