

Naked Impact

Social Stock Exchange

Burckart Consulting

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Investment Management

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**Interest in impact investing
(and related strategies) is
growing**

Personal Finance | Thu Aug 13, 2015 12:25pm EDT

Related: MONEY

Morningstar to score mainstream funds on ESG factors

BOSTON



Deval Patrick joins Bain Capital to lead new social impact fund

by Dan Primack @danprimack APRIL 13, 2015, 9:00 PM EDT

Goldman Sachs Agrees to Buy Asset Manager Imprint Capital

by Michael J. Moore

“Over the last two years there has been a big change where we see asset owners increasingly asking for ESG integration in their RFPs across all asset classes as opposed to just in equity, as was previously the case,” said Matt Christensen, global head of responsible investment at AXA Investment Managers (AXA IM), in *Investments & Pensions Europe*

Business | Mon Feb 9, 2015 11:56am EST

Exclusive: BlackRock to ramp up impact investing

BY JESSICA TOONKEL

Morgan Stanley launches sustainable investing institute

Sustainable Business

Thursday, November 7, 2013 - 4:00am

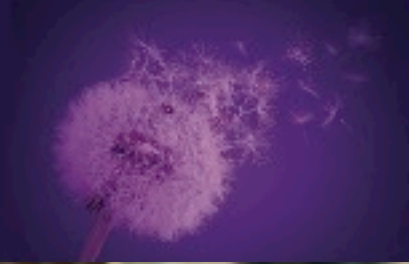
CalPERS gives its managers ESG ultimatum







**This matters because social
and economic priorities are
being reshaped**



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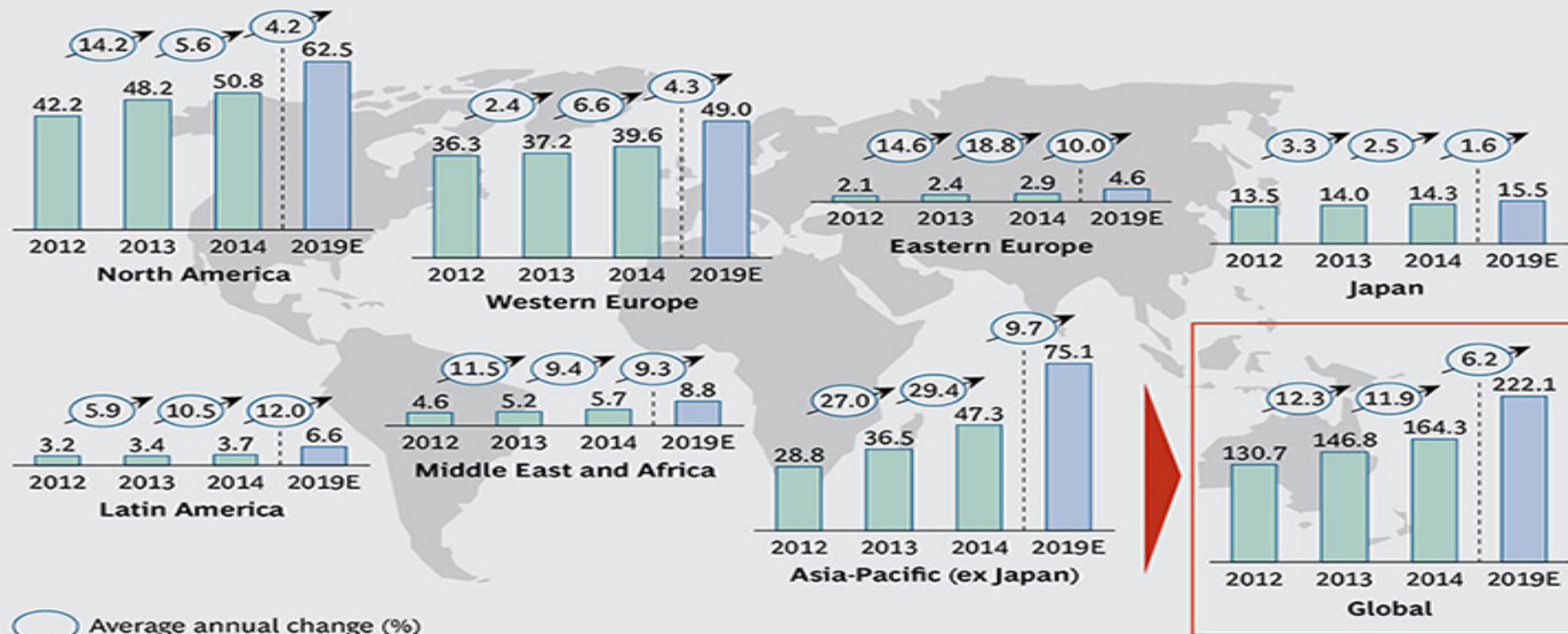






EXHIBIT 1 | Global Wealth Continued to Grow Strongly in 2014

Private financial wealth (\$trillions)



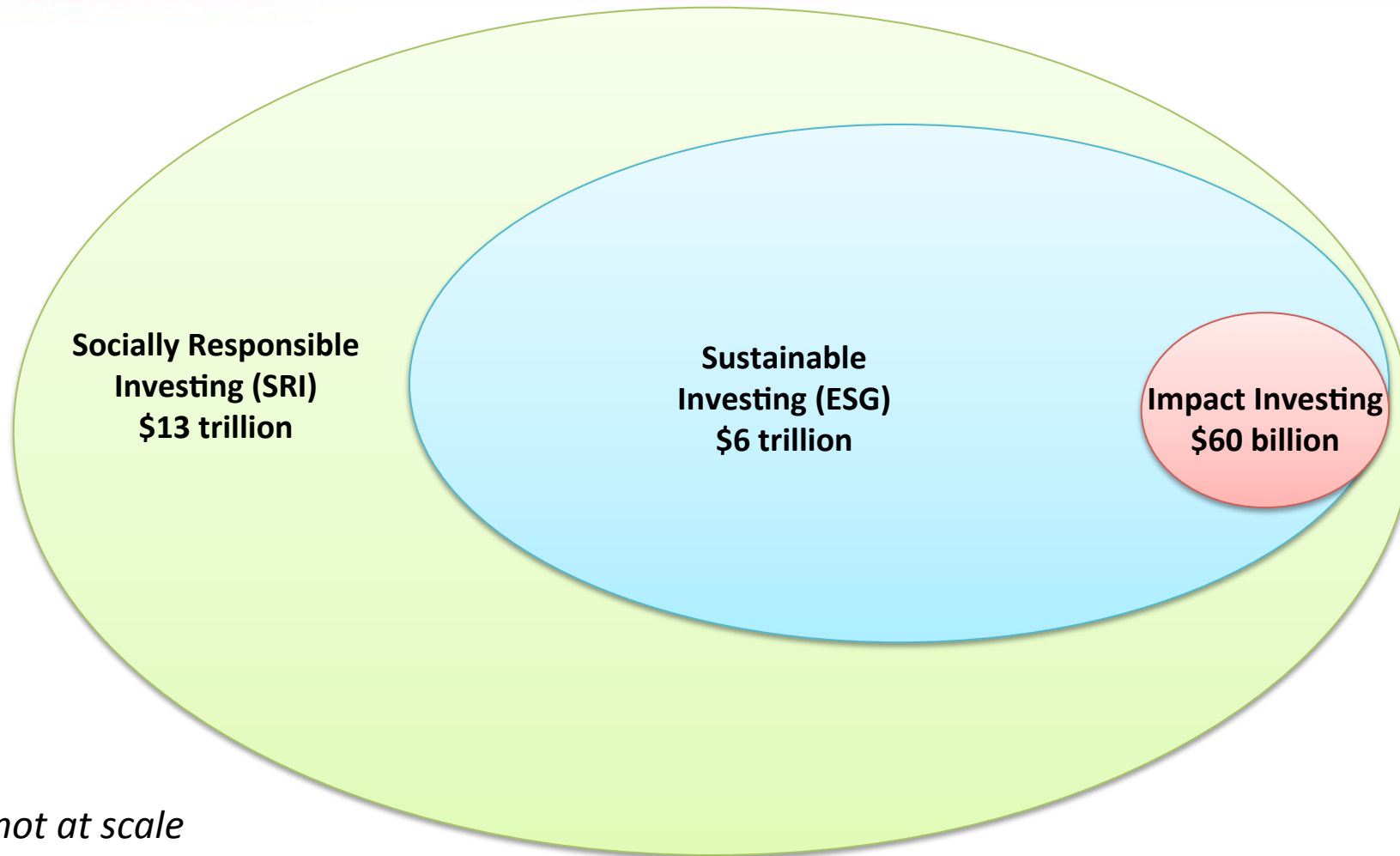
Source: BCG Global Wealth Market-Sizing Database, 2015.

Note: Private financial wealth is measured across all private households. All growth rates are nominal. With the exception of Argentina, numbers for all years were converted to U.S. dollars at average 2014 exchange rates to exclude the effect of currency fluctuations. Percentage changes and global totals of private financial wealth are based on complete (not rounded) numbers. Calculations for all years shown are based on the same methodology. For further details, please refer to the Methodology section of the report.

**Investment opportunities
are changing as a result**

A market is forming





Note: not at scale

<HELP> for explanation, <MENU> for similar functions.
Click numbers for transparency

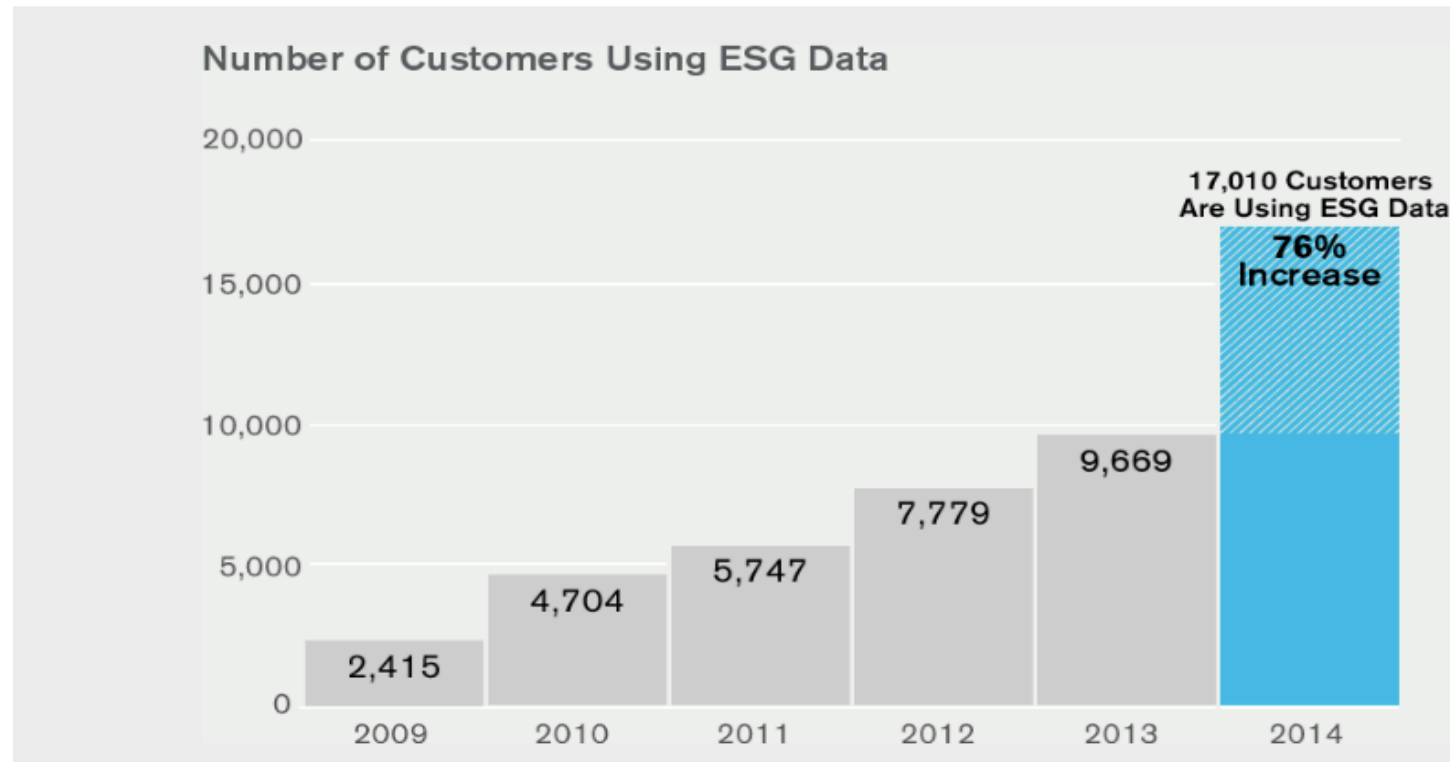
ABT US Equity		96 Settings		97 Actions		98 Output		99 Feedback		Financial Analysis	
Abbott Laboratories		Periods 10		Annuals		Currency USD					
1 Key Stats		2 I/S		3 B/S		4 C/F		5 Ratios		6 Segments	
7 Addl		8 ESG		9 Custom							
11 Overview		12 Environmental		13 Social		14 Governance		15 Exec & Dir Comp		16 ESG Ratios	
17 CDP											
In Millions (except Per Share)		FY 2012		FY 2011		FY 2010		FY 2009		FY 2008	
12 Months Ending		2012-12-31		2011-12-31		2010-12-31		2009-12-31		2008-12-31	
2007-12-31											
ESG Disclosure Score		52.07		49.59		49.59		48.35		48.35	
43.39											
Environmental											
Environmental Disclosure Score		48.06		44.96		44.96		44.96		44.96	
37.21											
Total GHG Emissions		1,009.00		1,656.00		1,724.00		1,769.00		1,861.00	
1,763.50											
NOx Emissions		0.28		0.67		0.77		0.77		0.85	
0.87											
Total Energy Consumption		3,366.94		5,622.50		5,791.67		5,661.39		5,425.83	
5,921.94											
Water Consumption		11,848.88		49,591.16		48,455.48		46,941.25		50,348.27	
52,241.07											
Hazardous Waste		7.81		20.57		21.59		18.26		23.91	
18.04											
Total Waste		61.36		109.40		120.90		110.97		128.76	
124.25											
Environmental Fines #		5		10		4		9		5	
6											
Environmental Fines \$		0.00		0.03		0.09		0.02		0.03	
0.02											
Social											
Social Disclosure Score		43.86		43.86		43.86		43.86		43.86	
43.86											
Number of Employees		91,000		91,000		90,000		72,868		68,838	
68,000											
% Women in Mgt		45.30		45.00		44.00		42.00		42.00	
43.00											
% Minorities in Mgt		25.40		24.00		22.00		21.00		20.00	
20.00											
Zoom 100%											
Australia 61 2 9777 8600 Brazil 5511 3048 4500 Europe 44 20 7330 7500 Germany 49 69 9204 1210 Hong Kong 852 2977 6000											
Japan 81 3 3201 8900 Singapore 65 6212 1000 U.S. 1 212 318 2000 Copyright 2014 Bloomberg Finance L.P.											
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Bloomberg

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Sustainable Business & Finance

Customers using ESG data increased 76% in 2014



*“For investment professionals, a key idea in the discussion of ESG issues is that systematically **considering ESG issues will likely lead to more complete investment analyses and better-informed investment decisions.**”*

ENVIRONMENTAL, SOCIAL, AND GOVERNANCE ISSUES IN INVESTING

A Guide for Investment Professionals



CFA Institute

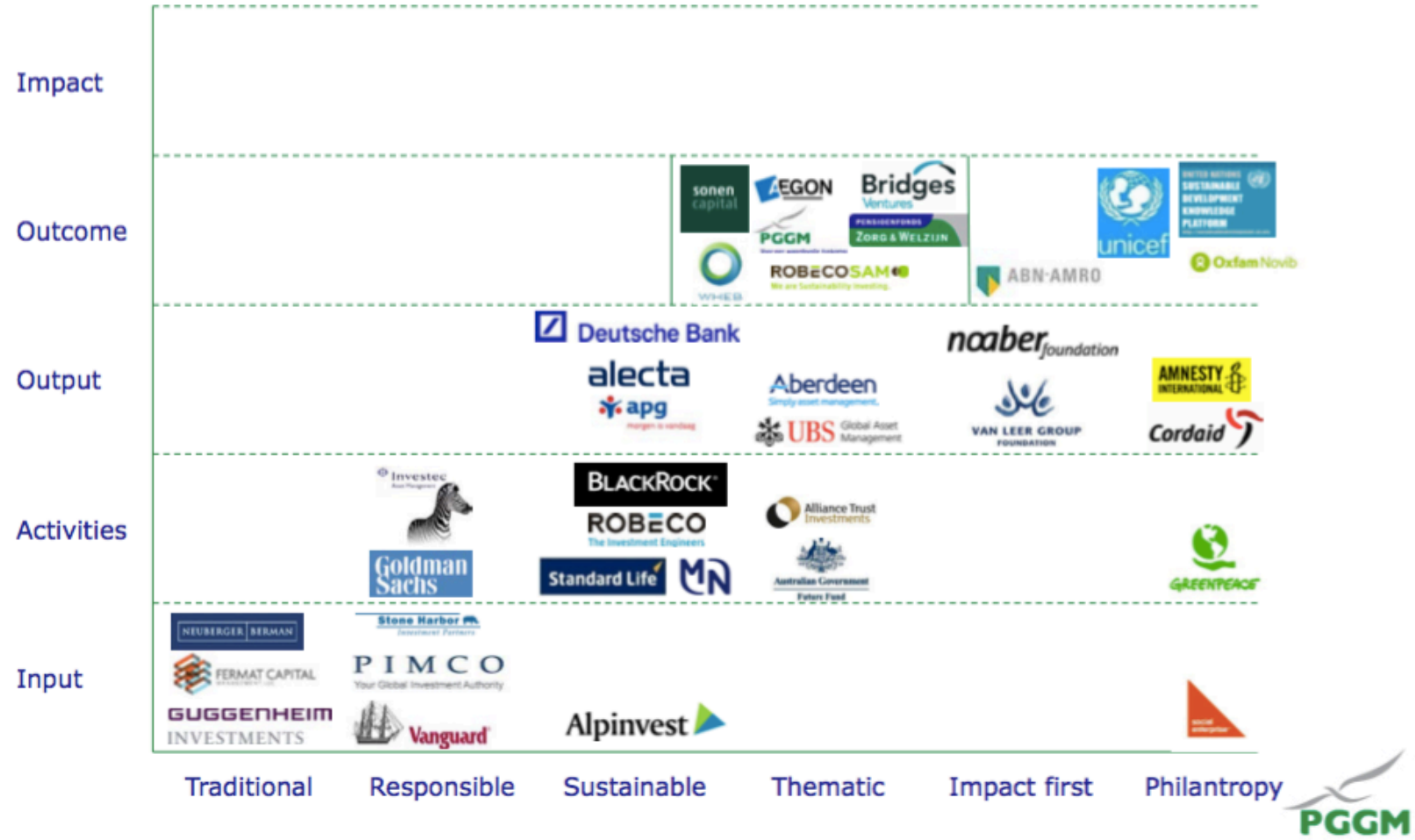
*“Investors use six methods for bringing ESG considerations into their decision making: **exclusionary screening, best-in-class selection, thematic investing, active ownership, impact investing, and ESG integration.** These methods are not mutually exclusive and are often used in combinations. They are used by both value- and values-motivated investors.”*

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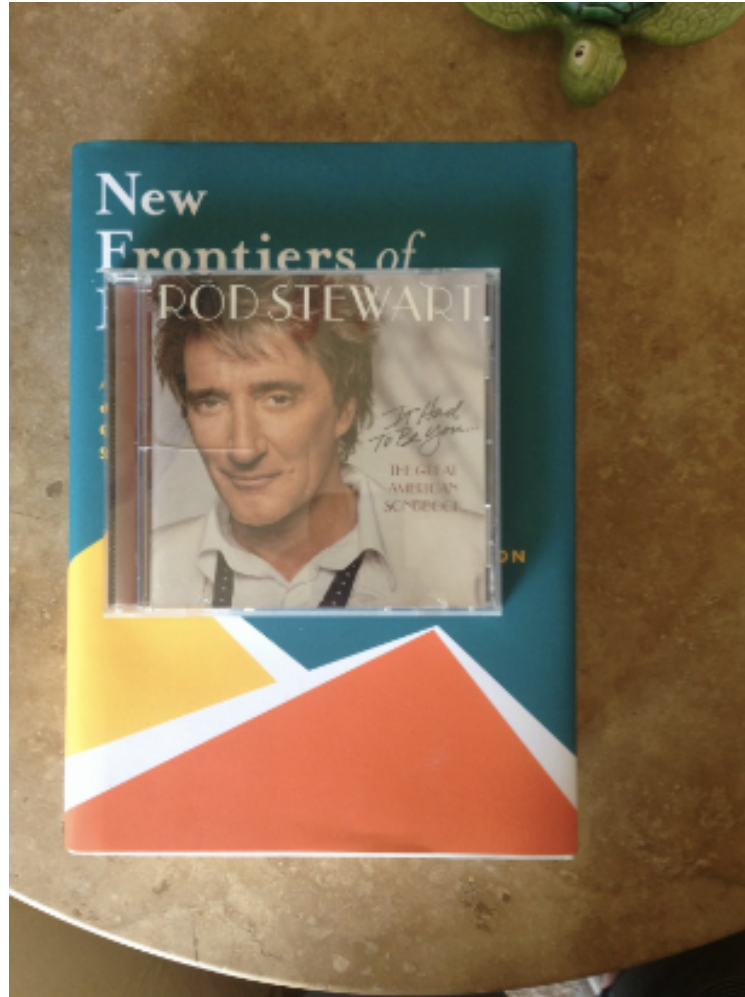


CFA Institute





**But these “new frontiers” are
being obscured**



Key questions:
what is impact investing? Why
is it important? How can I do
it?

Naked Impact

Moderator: Bill Burckart – Burckart Consulting

Panel:

Tomas Carruthers – Social Stock Exchange

Justin Urquhart Stewart – Seven Investment Management

Peter Matthews – Capital for Colleagues plc

Paul de Savary – Home from Home Care

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