



Naked Impact

Social Stock Exchange

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www.socialstockexchange.com

Interest in impact investing
(and related strategies) is
growing

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

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BOSTON



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BY JESSICA TOONKEL

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Sustainable Business
Thursday, November 7, 2013 - 4:00am

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by Dan Primack

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APRIL 13, 2015, 9:00 PM EDT

“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*

CalPERS gives its managers ESG ultimatum







This matters because social
and economic priorities are
being reshaped

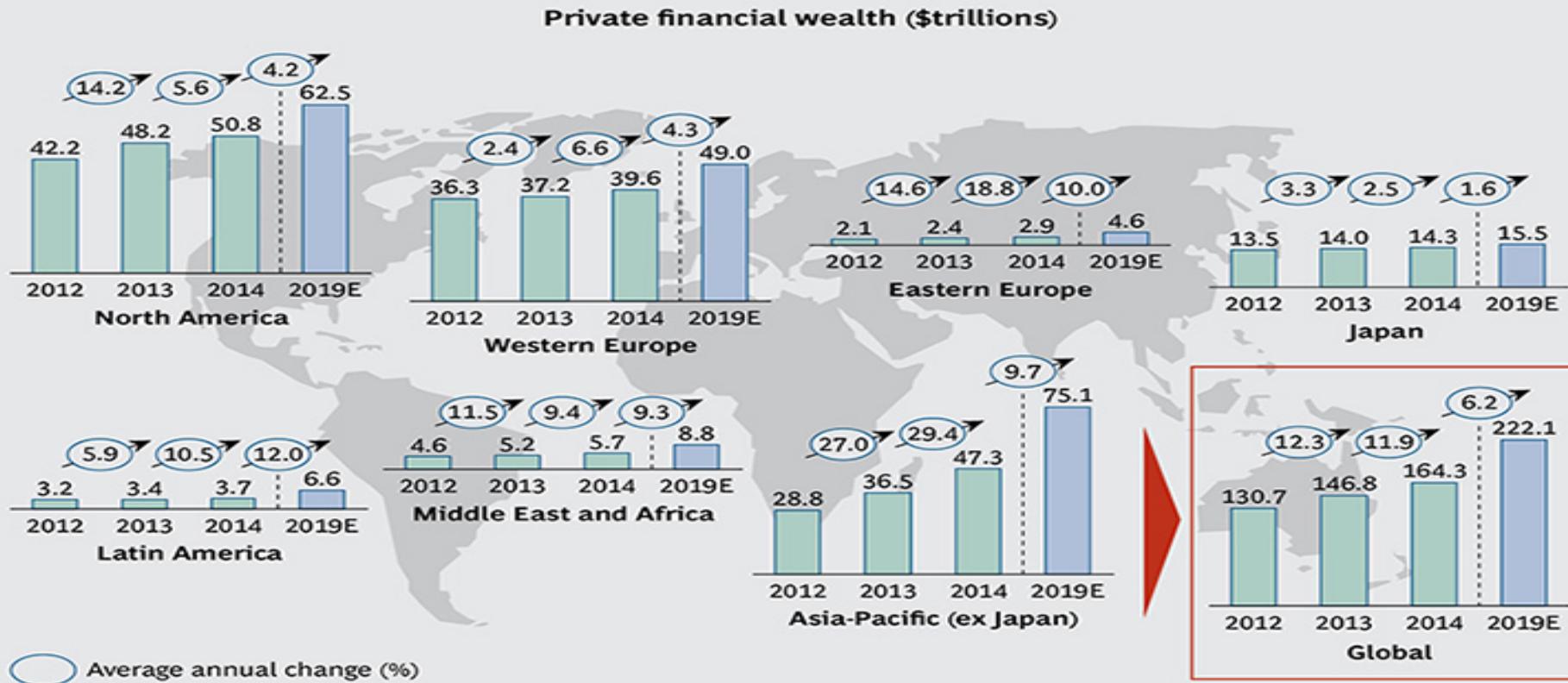


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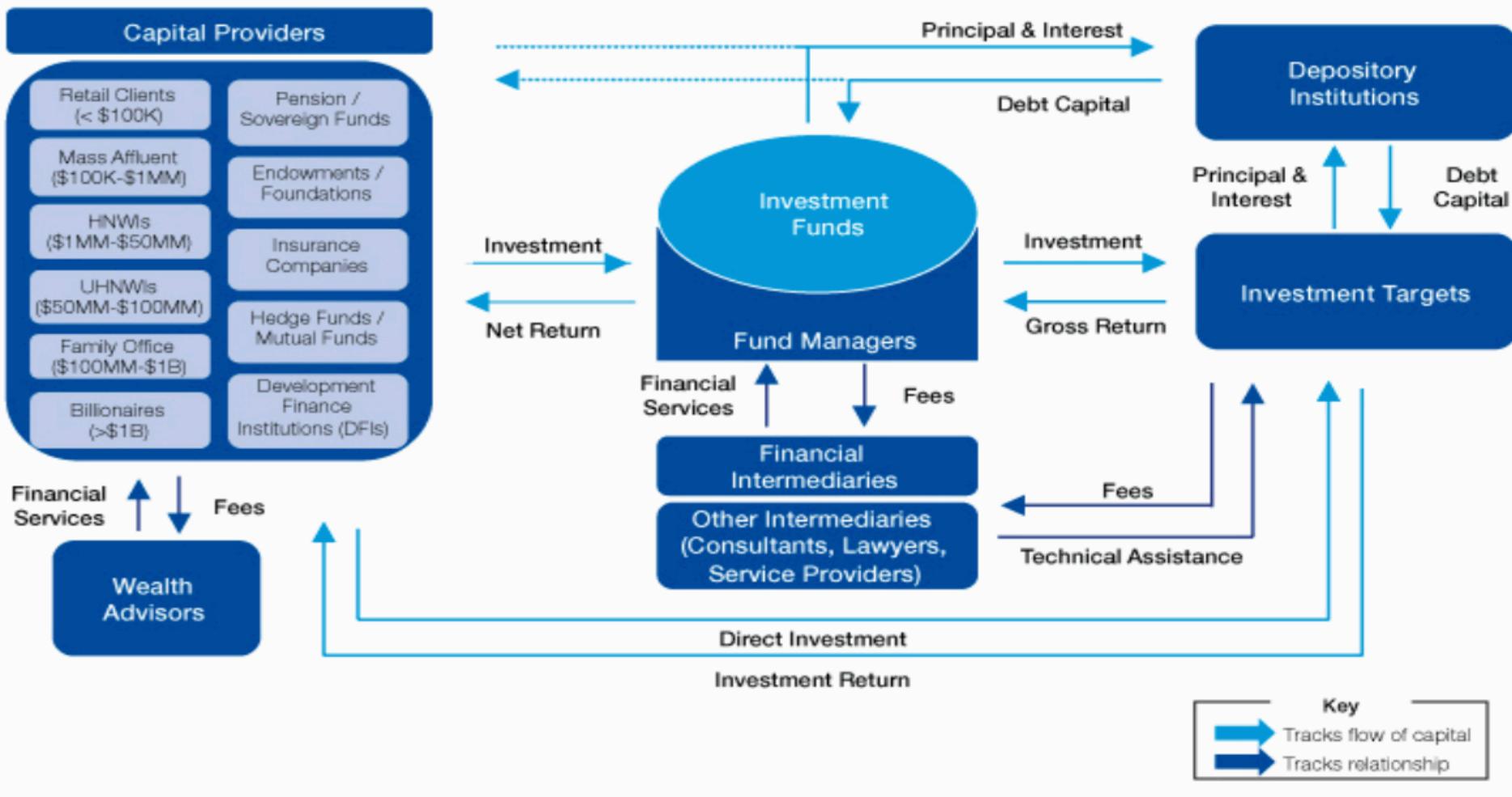
EXHIBIT 1 | Global Wealth Continued to Grow Strongly in 2014


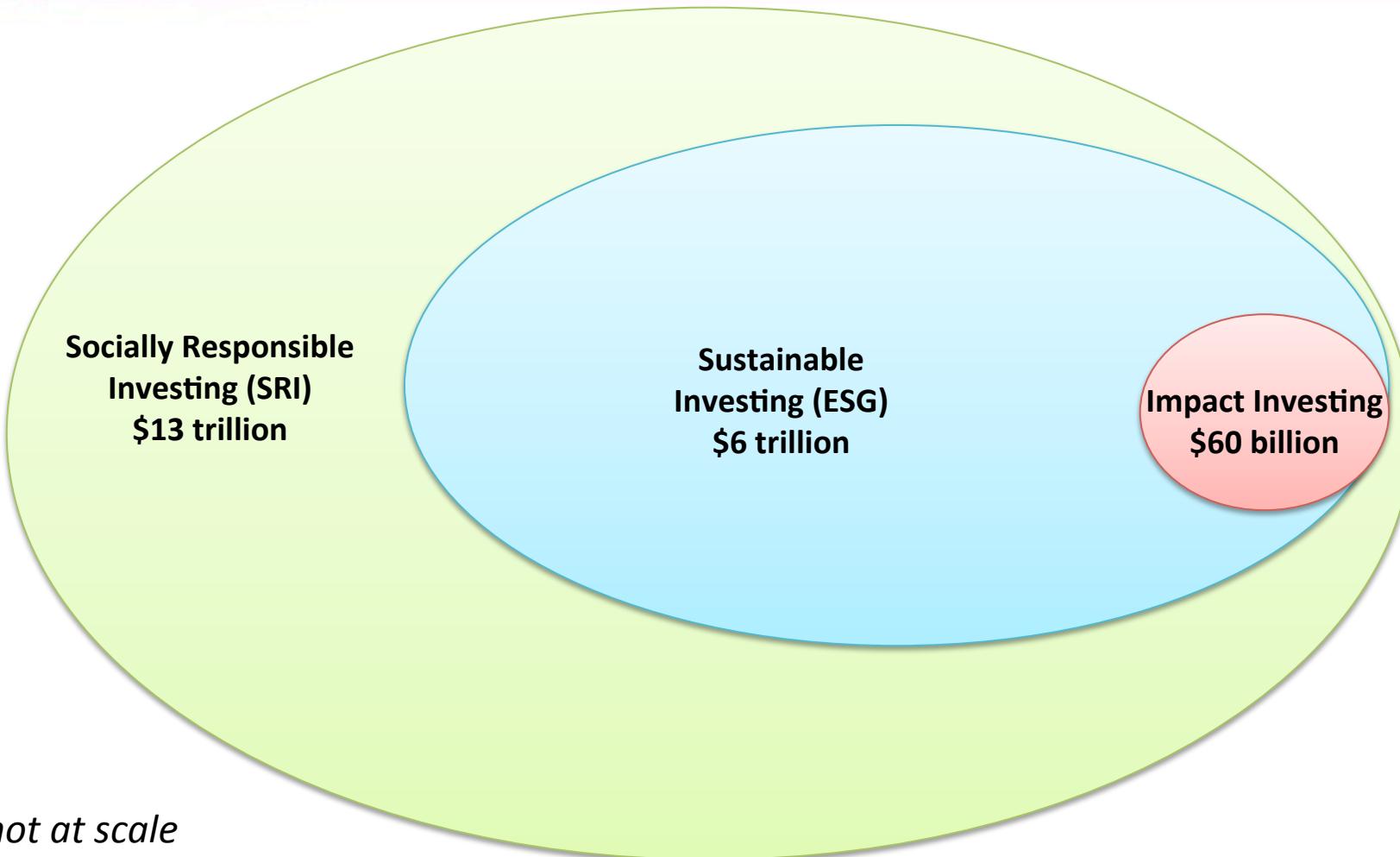
Source: BCG Global Wealth Market-Sizing Database, 2015.

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





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Abbott Laboratories Periods 10 Annuals 11 Currency USD

1 Key Stats 2 I/S 3 B/S 4 C/F 5 Ratios 6 Segments 7 Addl 8 ESG 9 Custom

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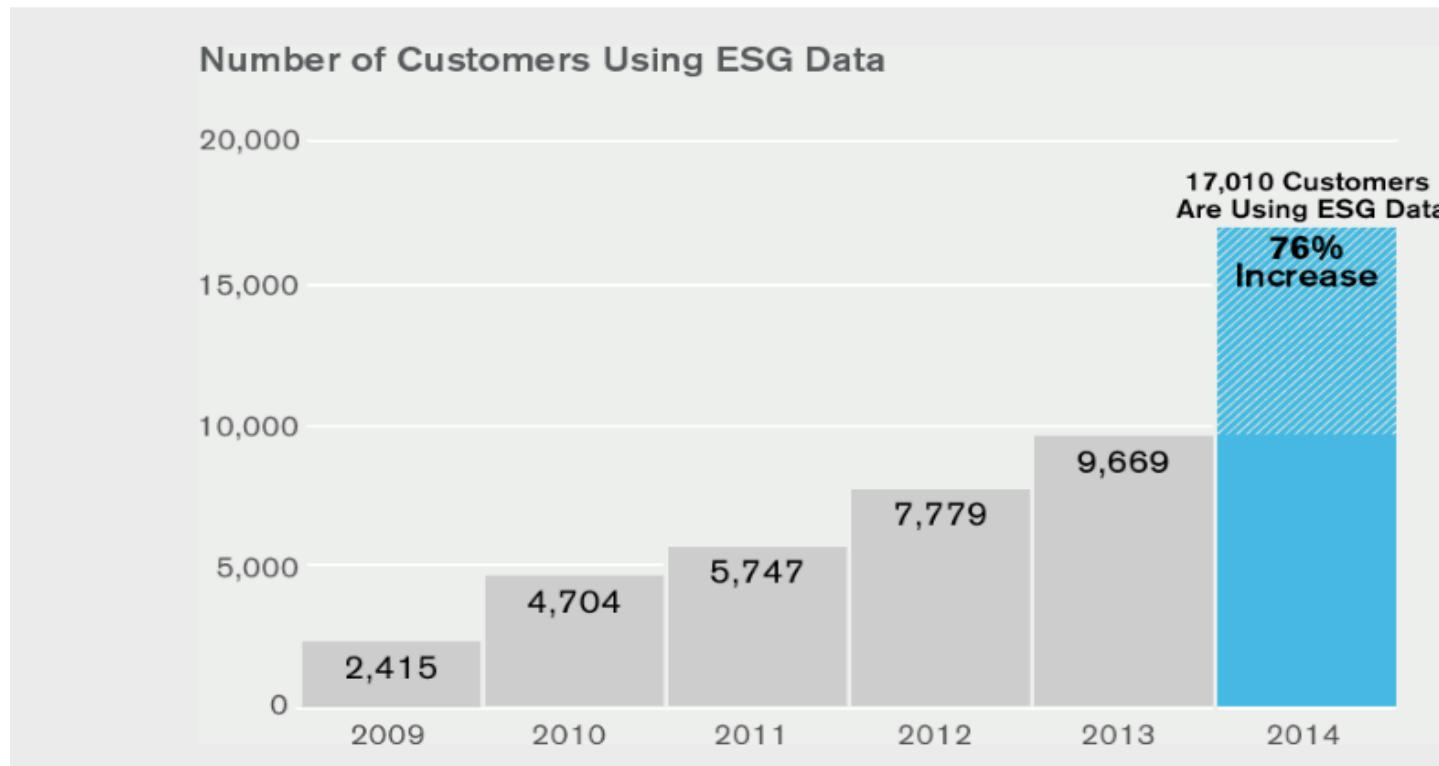
In Millions (except Per Share)

	FY 2012	FY 2011	FY 2010	FY 2009	FY 2008	FY 2007
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
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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

Impact

Outcome

Output

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Responsible

Sustainable

Thematic

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PGGM



Deutsche Bank

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Aberdeen
Simply asset management.
UBS Global Asset Management

naaber foundation
VAN LEER GROUP FOUNDATION

AMNESTY INTERNATIONAL
Cordaid



BLACKROCK
ROBECO
The Investment Engineers

Alliance Trust Investments
Australian Government Future Fund



Goldman Sachs

Standard Life MN

NEUBERGER BERMAN

Stone Harbor
Investment Partners

PIMCO
Your Global Investment Authority

Alpinvest

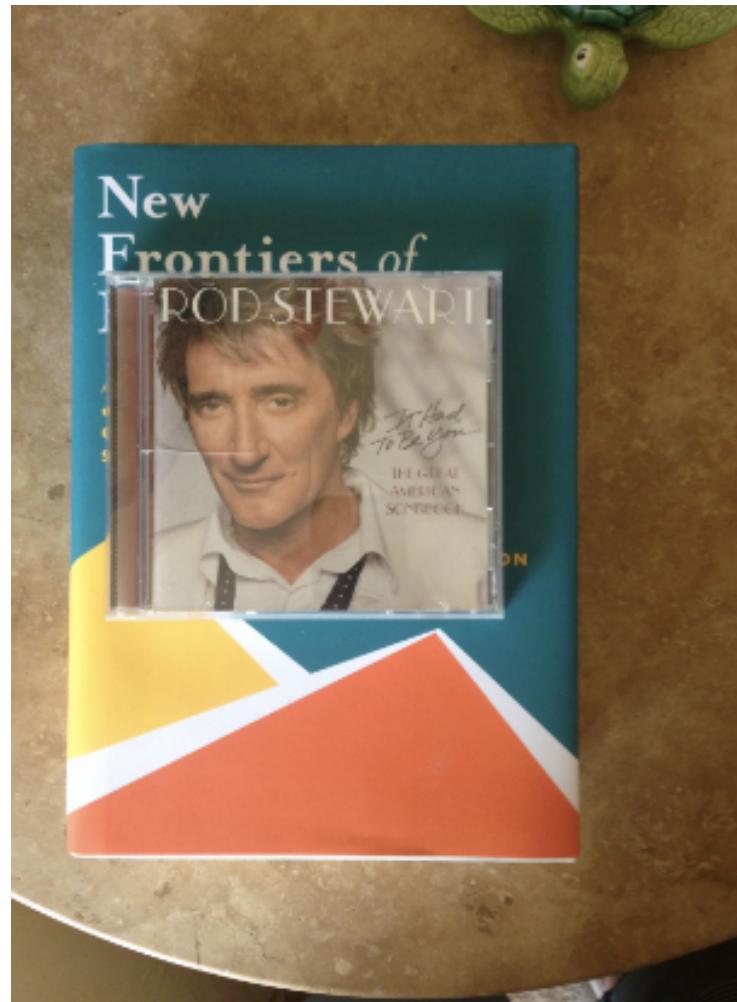
FERMAT CAPITAL
INVESTMENT

GUGGENHEIM
INVESTMENTS

Vanguard



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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