



Sustainable investing is clearly entering the mainstream:

- Over 1,000 asset owners and managers, responsible for \$34 trillion in assets worldwide, have signed the United Nations Principles of Responsible Investment, making the commitment to incorporate sustainability criteria into their investment decisions.
- Over \$13 trillion in assets worldwide are now managed with sustainability criteria and strategies.
- A 2012 survey of over 1,000 investment advisors found 38% with a strong interest in offering sustainable investments and 47% who have clients currently engaged in sustainable investing.

What does this mean for investment professionals and their clients, and why is it important now?

Sustainable investing incorporates environmental, social and governance considerations into investment decisions to achieve **competitive long-term financial returns** and positive societal impact. It informs and integrates with existing investment practice.

Sustainable investing creates value by reducing the risks and capturing the opportunities presented by the transition to a sustainable economy. Environmental degradation, resource scarcity, climate change, financial crises, rising levels of social inequality, aging infrastructure and institutional governance failures are large scale challenges to the global economy whose impacts and potential solutions are best understood and addressed through the lens of sustainable investing.

Sustainable investment offers investment professionals a coherent way to respond to growing investor demand for "values-based", "socially responsible" or "impact" investing. A large body of academic and market-based evidence is accumulating that **sustainability factors are positively associated** with market outperformance, lower fundamental risk and a lower cost of capital.

The Boston Security Analysts Society is pleased to bring an outstanding group of practitioners and thought leaders together in Boston on November 19th for a full-day seminar on sustainable investing.

Our first set of speakers, Rob Lake and Erika Karp, will present a thorough survey of the sustainable investment landscape and the compelling reasons for investors and managers to be participating now.

They will be followed by a series of practitioners providing a more in-depth discussion of practical implementation and issues:

- How sustainable investing strategies are being incorporated into investment portfolios
- Investing across multiple asset classes
- Responding to externalities – the fossil fuel investment/divestment controversy
- Measuring and reporting returns and the role of standards

We will also offer hands-on workshops providing experience with some of the tools available to investment professionals engaged in sustainable investing.