



## NEWS RELEASE

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### **Thomson Reuters and UKSIF Announce the 2014 SRI & Sustainability Survey Results**

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**LONDON, July 16, 2014** – Thomson Reuters and the UK Sustainable Investment and Finance Association (UKSIF) announced the results of the 12<sup>th</sup> annual Thomson Reuters Extel/UKSIF SRI & Sustainability Survey at an event hosted by Schroder Investment Management UK in London.

The 2014 Survey represents the views of over 360 investment professionals from 27 countries, making it the most extensive assessment of socially responsible investing (SRI) in the European investment community. Voting was conducted from 24<sup>th</sup> March to 7<sup>th</sup> May 2014. It reflects a contribution from 179 buy-side firms and 14 brokerage firms/research houses.

#### **Key highlights from the 2014 Thomson Reuters Extel/UKSIF Survey include:**

- Thematic reviews & ideas are the most critical SRI/ESG research services as far as the buy-side are concerned, with over 80% rating these as very important
- 34% of asset managers look for all SRI/ESG research & insights to be integrated into all analyses they receive from brokers
- Sustainability a growing element in remit and discussions of IR teams at companies, with 56% now including it as integral to their IR outreach

**Key rankings from the Thomson Reuters Extel/UKSIF Survey** include (2013 ranking in brackets):

#### **Leading Brokerage Firm for SRI & Sustainability Overall**

1. Kepler Cheuvreux (1)
2. Societe Generale (4)
3. Bank of America Merrill Lynch (2)

#### **Leading Brokerage Firm for SRI Research**

1. Societe Generale (3)
2. Kepler Cheuvreux (1)
3. Bank of America Merrill Lynch (2)

#### **Leading Brokerage Individual for SRI Research**

1. Sarbjit Nahal, Bank of America Merrill Lynch (1)
2. Carole Crozat, Societe Generale (5)
3. Yannick Ouaknine, Societe Generale (3)

#### **Leading Brokerage Firm for Corporate Governance Research**

1. Kepler Cheuvreux (1)
2. Societe Generale (4)
3. Natixis (7)



### Leading Brokerage Individual for Corporate Governance Research:

1. Robert Walker, Kepler Cheuvreux (1)
2. Yannick Ouaknine, Societe Generale (11)
3. Jean-Philippe Desmartin, Oddo Securities (2)

### Leading Brokerage Firm for Integrated Research on Climate Change

1. HSBC (2)
2. Kepler Cheuvreux (1)
3. Bank of America Merrill Lynch (3)

### Leading Brokerage Individual for Integrated Research on Climate Change

1. Zoe Knight, HSBC (3)
2. Sarbjit Nahal, Bank of America Merrill Lynch (5)
3. Wai-Shin Chan, HSBC (6)

### Leading Corporate for Sustainability Communication

1. L'Oréal (N/A)
2. Eni (N/A)
3. Carrefour (N/A)

### Leading Fund Management Firm Best at SRI/ESG

1. Natixis Asset Management (N/A)
2. Amundi Asset Management (N/A)
3. Robeco (N/A)

"We are delighted to partner with Extel Thomson Reuters once again on these important awards," said **Simon Howard**, UKSIF Chief Executive. "Two weeks ago the Law Commission said fiduciaries *"should take financially material factors into account"* and cited ESG elements as an example of those factors. This highlights how SRI and sustainability thinking is relevant to the mainstream. These awards showcase the financial sector's successful integration of sustainability and ESG across the value chain, from brokers through fund managers to companies."

"We at Extel are proud of the continuing depth of interest shown by all three sides of the community in evaluating SRI/ESG services & insights. The provision of research has become both more specialized and multi-faceted, reflecting the desire from investors for more sophisticated analyses; and ideas directly relevant to investment opportunities," commented **Steve Kelly**, managing director of Extel at Thomson Reuters. "Extel remains 100% committed to capturing market sentiment and views on this vital part of the investment community."

Copies of the complete report, with commentary, extensive market trends data and full rankings of sell-side, corporates and asset managers, can be ordered from Thomson Reuters Extel through [www.extelsurveys.com](http://www.extelsurveys.com).

### Thomson Reuters

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### UK Sustainable Investment and Finance Association (UKSIF)

The UK Sustainable Investment and Finance Association (UKSIF) supports the UK finance sector as a global leader in advancing sustainable development through financial services. We promote and support responsible



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investment and other forms of finance that advance sustainable economic development, enhance quality of life and safeguard the environment. Founded in 1991, UKSIF has approximately 250 members including pension funds, asset managers, research providers, financial advisers, banks and non-governmental organisations. For more information, please visit [www.uksif.org](http://www.uksif.org).

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