



## NEWS RELEASE

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### Thomson Reuters Extel and UKSIF 2013 SRI & Sustainability Survey Results

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**LONDON, July 12, 2013** – Thomson Reuters and the UK Sustainable Investment and Finance Association (UKSIF) announced the results of the 11<sup>th</sup> annual Thomson Reuters Extel/UKSIF SRI & Sustainability Survey at an event hosted by FTSE Group in Canary Wharf, London on 11 July.

The 2013 Survey represents the views of over 500 investment professionals from 29 countries, making it the most extensive assessment of socially responsible investing (SRI) in the European investment community. Voting was conducted from 26 March to 3 May 2013. It reflects a contribution from 215 buy-side firms and 26 brokerage firms/research houses.

#### Key highlights from the 2013 Thomson Reuters Extel/UKSIF Survey include:

- Over 80% of the buy-side see thematic research as vital in SRI/ESG analysis
- Nearly 75% see SRI/ESG issues as material to stock prices
- Oil companies seen as the laggards in meeting the needs of SRI investors

**Key rankings from the Thomson Reuters Extel/UKSIF Survey** include (2012 ranking in brackets):

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

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

#### Leading Brokerage Firm for SRI Research

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

#### Leading Brokerage Individual for SRI Research

1. Sarj Nahal, Bank of America Merrill Lynch (1)
2. Orith Azoulay, Natixis (7)
3. Yannick Ouaknine, Société Générale (6)

#### Leading Brokerage Firm for Corporate Governance Research

1. Kepler Cheuvreux (1)
2. UBS (4)
3. Oddo Securities (2)

#### Leading Brokerage Individual for Corporate Governance Research

1. Rob Walker, Kepler Cheuvreux (1)
2. Jean-Philippe Desmartin, Oddo Securities (2)
3. Julie Hudson, UBS (7)

#### Leading Brokerage Firm for Thematic Research



1. Bank of America Merrill Lynch (1)
2. Goldman Sachs (5)
3. Kepler Cheuvreux (4)

**Leading Brokerage Individual for Thematic Research**

1. Sarj Nahal, Bank of America Merrill Lynch ( - )
2. Valery Lucas-Leclin, Bank of America Merrill Lynch (2)
3. Julie Hudson, UBS (1)

**Leading Brokerage Firm for Renewable Energy Research**

1. Macquarie Securities Group (2)
2. UBS (1)
3. Kepler Cheuvreux (4)

**Leading Brokerage Individual for Renewable Energy Research**

1. Robert Schramm-Fuchs, Macquarie Securities Group (1)
2. Jason Channell, Citi (9)
3. Jean-Francois Meymandi, UBS (2)

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

1. Kepler Cheuvreux (2)
2. HSBC (1)
3. Bank of America Merrill Lynch (5)

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

1. Nick Robins, HSBC (1)
2. Erwan Créhalet, Kepler Cheuvreux (2)
3. Zoe Knight, HSBC (3)

**Leading Brokerage Firm for SRI Roadshows**

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

**Leading Quoted Company for Sustainability Communications**

1. Nestlé SA (2)
2. BMW Group (7)
3. BASFSE (10)

**Leading Fund Management Firm Best at Engaging for Long Term Value**

1. Fidelity Management & Research (19)
2. BlackRock Investment Management (UK) (2)
3. Capital Research Global Investors (7)

“UKSIF is proud to partner in this increasingly important, market leading survey,” said **Simon Howard**, UKSIF Chief Executive. “The quantity and breadth of responses received, and the significance placed on the SRI and ESG themes covered, yet again highlights the value of this analysis and its research leaders to the entire investment community.”

“Extel 2013 has again seen very strong participation from all three sides of the investment community - buy-side, sell-side and corporates - in all Sustainability & SRI categories and trend questions,” commented **Steve Kelly**, managing director of Extel at Thomson Reuters. “Investors are increasingly



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looking for positive ESG/SRI factors as part of their decision process, and the importance of sustainability research & advisory is now crystal clear, and can only grow further.”

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

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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 investment and other forms of finance that advance sustainable economic development, enhance quality of life and safeguard the environment. Founded in 1991, UKSIF has over 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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