

Socially Responsible Investments – SRI

Topic

Socially Responsible – or Sustainable – Investments (SRI) are neither fashion nor fad. In one form or other, they have been around for more than 90 years and the current financial crisis has not made them fade into nothingness. Quite on the contrary, the consideration of environmental, social, governance as well as ethical criteria has become more important than ever for investment decisions and forms the basis of SRI.

Content

This seminar will take a look at the development as well as state of the art of Socially Responsible Investments, clarifying the various terms – often mistakenly –used in this context. Presentations focus on:

- The background and development of Socially Responsible Investments – back to the roots
- Socially Responsible Investment Products: from funds to derivatives
- Performance issues: what's the track record of Socially Responsible Investments
- Integration: where do environmental, social and ethical criteria fit into financial valuation models

Who should attend?

Financial professionals who want to be informed efficiently and pragmatically about the current state and new developments of Socially Responsible Investments (SRI).

Speakers

Dr. Annett Baumast

Senior Sustainability Analyst, Zürcher Kantonalbank (ZKB)

Marco Curti

Head of Research, Zürcher Kantonalbank (ZKB)

Robert Hauser

Head of Sustainability Research, Zürcher Kantonalbank (ZKB)

Dr. René Nicolodi, CAIA

Senior Sustainability Analyst, Zürcher Kantonalbank (ZKB)

Language

English

Time and Venue

09:30 – 12:30 and 14:00 – 17:00

Société de Lecture, 11, Grand-Rue, 1204 Genève
(For map details: www.societe-de-lecture.ch)

Seminar fees

SFAA members' attendance is free of charge.

For non SFAA members the fee is CHF 540.– and includes documentation and refreshments.

Registration

Register online (www.azek.ch/campus) or apply with the Registration form on the reverse.

Information

For more information please contact the secretariat of AZEK at:

AZEK AG, Feldstrasse 80, 8180 Bulach, Switzerland

campus@azek.ch

T+41 44 872 35 35

F+41 44 872 35 32

Socially Responsible Investments – Speakers



Dr. Annett Baumast, Senior Sustainability Analyst, Zürcher Kantonalbank (ZKB), has been working as a Sustainability Analyst in Zürcher Kantonalbank's sustainability research team since 2004. She is responsible for the technology sector, covering telecommunications, hardware and software companies as well as electronic consumer goods. Annett completed her studies in Business Administration and Economics with a focus on Environmental Management and Sustainability at the University of Hanover in Germany and holds a PhD in Environmental Management from the University of St. Gallen. She regularly teaches and publishes on sustainability and socially responsible investment.



Marco Curti has been heading the Research Department at Zürcher Kantonalbank (ZKB) since 1991. He introduced the SRI approach into the research process more than 10 years ago at ZKB. Since then, the SRI research team has developed models to cover both equities and bonds and has been involved in the launch of many SRI investment products by the ZKB and other providers. Marco Curti studied Economic History at the University of Zurich. He was financial analyst and portfolio manager before 1991 and since 2004 he has been chairman of the Swiss Financial Analyst Association (SFAA). He is a member of the European Federation of Financial Analysts Societies' (EFFAS) committee on Environment, Social and Governance (ESG), the index committee of the SIX Swiss Exchange and the Swisscanto Investment Advisory Board.



Robert Hauser is Head of the Sustainability Research department of Zürcher Kantonalbank (ZKB). With his team, he provides the basis for in-house and external sustainable investment products, several of which he has co-launched – for instance Swisscanto Green Invest. From 1999 to August 2006 he was Deputy Head of the department he now heads, having started his career at ZKB as an environmental analyst in 1998. Robert Hauser graduated from the Eidgenössische Technische Hochschule Zürich (Swiss Federal Institute of Technology Zurich) in 1996 with a Master's Degree in Environmental Sciences. Since 2003 he holds an Executive MBA from Zürcher Hochschule Winterthur (ZHW).



Dr. René Nicolodi, CAIA, is deputy head of the Sustainability Research department of Zürcher Kantonalbank (ZKB) and has been covering the life science, chemical, building and building supplies sector as a senior analyst since 2002. He also analyses the performance of sustainable investments and is a lecturer in corporate governance at the University of Applied Sciences for Business Administration Zurich (HWZ). René Nicolodi studied English, Business Administration and European Economic Law at the University of Zurich. During his studies, he gained work experience within the financial services and executive research sector. In 2006, he graduated with a PhD in sustainable pension fund engagement from the University Zurich. He has been holding the diploma as a Chartered Alternative Investment Analyst (CAIA) since April 2009.

AZEK Campus – Inscription

Inscriptions en ligne sur le site www.azek.ch/campus

Je m'inscris au séminaire « **Socially Responsible Investments – SRI** » de l'AZEK Campus du 14 octobre 2009 à Genève

Je ne suis pas membre de la SFAA ; la participation au séminaire s'élève à CHF 540.-*

* La documentation et les boissons consommées pendant le séminaire sont comprises dans le prix.

Je suis membre* de la SFAA

* Les membres de la SFAA doivent seulement indiquer leur nom, prénom et email.

Je souhaite devenir membre de la SFAA ; veuillez me contacter

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Monsieur

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Veuillez envoyer ou faxer le formulaire dûment complété à l'adresse suivante :

AZEK The Swiss Training Centre for Investment Professionals, Feldstrasse 80, 8180 Bülach, T +41 44 872 35 35 F +41 44 872 35 32, campus@azek.ch, www.azek.ch/campus

Conditions générales

Pour les participants qui ne sont pas membres de la SFAA, les frais de participation au séminaire sont payables dès réception de la facture.

Un séminaire est organisé seulement si le nombre de participants est suffisant. Si nécessaire, l'AZEK peut annuler un séminaire au plus tard 5 jours ouvrables avant la date du séminaire.