

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

German

Time and Venue

09:00 – 12:00 and 13:30 – 16:30

SIX Swiss Exchange, ConventionPoint, Selnaustrasse 30, 8021 Zürich (www.conventionpoint.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:

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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 – Anmeldung

Online Anmeldungen unter www.azek.ch/campus

Ich melde mich für das AZEK Campus Seminar
«**Socially Responsible Investments – SRI**»
vom 16. Oktober 2009 in Zürich an

Ich bin nicht SFAA Mitglied; die Seminarteilnahme kostet
CHF 540.–*

* Die Kosten beinhalten die Kursunterlagen sowie die Seminar Getränke.

Ich bin SFAA Mitglied*
* SFAA Mitglieder müssen lediglich Name, Vorname und E-Mail angeben.

Ich möchte Mitglied der SFAA werden; bitte kontaktieren
Sie mich

Frau Herr

Name* Vorname*

Titel Funktion*

Arbeitgeber

Adresse* Privat Geschäft

Strasse, Nr. PLZ, Ort

Telefon Fax

E-Mail*

Ort und Datum Unterschrift

*Pflichtfelder

Bitte Formular vollständig ausgefüllt einsenden oder faxen an:

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Allgemeine Bedingungen

Die Teilnahmegebühren sind von den Teilnehmern, die nicht Mitglied der SFAA sind, unmittelbar nach Erhalt der Rechnung zu entrichten.

Die Seminare finden nur bei ausreichender Teilnehmerzahl statt. Unter bestimmten Umständen kann AZEK ein Seminar spätestens 5 Arbeitstage vor dem Seminartermin absagen.