



Workshops

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Investing in the SDGs and Measuring Impact

Stockholm, April 26, 2018

This workshop series for asset owners provides the opportunity for detailed discussion of new research with a select group of service providers. Research presentations and small roundtable discussions will focus on new SDG-aligned investment products and internal processes for measuring the impact and additionality of these investments. As institutional investors rise to the challenge of using the 17 SDGs as a roadmap for impact and performance measurements, questions have to be asked all along the investment chain. These workshops are a unique opportunity for peer-to-peer learning in a focused setting. Only asset owners (pension funds, insurance companies, endowments etc.) and their appointed investment consultants will be invited to participate in these workshops.

Introduction: what are the SDGs?

The UN Sustainable Development Goals are a democratically agreed upon vision for the world in 2030 linked to 17 development goals. Each goal identifies an ESG risk or opportunity that can affect long-term shareholder value. The goals are interconnected and encompass micro risks at the company or industry-level as well as macro trends related to market failures and systemic risk. To achieve the United Nations SDG Agenda from 2015 - 2030 will require global investments estimated at \$90 trillion, with most of this amount expected to come from the private sector.



Why are investors acting?

Investors are integrating SDG factors into their investment decision-making processes for two key reasons. First, achieving the SDGs will be a key driver of global economic growth, which long-term investors acknowledge as the ultimate source of reliable financial returns. Secondly, individual companies and sectors who build more sustainable business practices into their operations, products, and services will generate new investment opportunities. An additional driver of investor action on the SDG Agenda is the downside risk of not achieving the the goals, which would augment systemic risk across regions and asset classes. These risks could materially reduce portfolio returns for universal investors.

	Agenda
0800	Breakfast & Registration
0830	Welcome from Responsible Investor
0840	Presentation: Anders Thorendal, Chief Investment Officer, Church of Sweden
0850	Presentation: Wellington Management
0900	Session 1: Assessing investability & integration with existing asset allocation strategy <ul style="list-style-type: none"> • <i>What taxonomies are leading investors using to map the investable universe of SDGs?</i> • <i>How can SDG themes be aligned with existing portfolio strategies?</i> • <i>How will SDG-related research be integrated within the investment process and who should lead this internal work?</i>
0940	Move guests to new tables
0950	Presentation: Catherine Ogden, Manager, Sustainability & Responsible Investment, Legal & General
1000	Session 2: Stewardship and market awareness raising <ul style="list-style-type: none"> • <i>Strategies for aligning existing engagement with SDGs</i> • <i>Is there a role for investors to play in educating companies on the SDG agenda?</i> • <i>How can SDG-related engagement add value for investors?</i>
1040	Networking Break
1110	Presentation: William Nicoll, Co-Head of Alternative Credit, M&G Investments
1120	Session 3: Metrics, benchmarking, and public reporting <ul style="list-style-type: none"> • <i>What metrics are investors asking companies to report on with reference to the SDG impact of their business?</i> • <i>Should investors use an existing set of SDG impact indicators or construct a bespoke framework?</i> • <i>How can investors measure their progress against SDG targets at the company and portfolio level?</i>
1200	Move guests to new tables
1210	Presentation: Dennis van de Putten, Head of Sustainability & Strategy, Actiam
1220	Session 4: Practical takeaways from the SDG product development process <ul style="list-style-type: none"> • <i>What parts of the research can be done in-house and when is external expertise necessary?</i> • <i>How can investors select products in fixed income and listed and private equity that align with their existing investment strategies?</i> • <i>Is an SDG strategy right for you?</i>
1300	Lunch

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