

Zurich, April 10, 2012

### **SAM kicks off annual Corporate Sustainability Assessment – leading companies will make it into the Dow Jones Sustainability Index**

- **2,500 largest companies can report on their sustainability practices**
- **Evaluation serves as basis for construction of prestigious Dow Jones Sustainability Index**
- **800 additional companies from emerging markets are invited and encouraged to participate**

SAM, the investment boutique focused exclusively on Sustainability Investing, invites the 2,500 largest companies in terms of free float market capitalization from all sectors to participate in its annual Corporate Sustainability Assessment (CSA). The CSA is the research backbone for the construction of the Dow Jones Sustainability Indexes (DJSI). After the assessment, companies are included in the DJSI World if their sustainability performance ranks among the top 10% of their industry peers.

#### **SAM's approach to measuring corporate sustainability**

The [CSA](#) focuses on a company's long-term value creation with over 100 questions on financially material economic, environmental and social practices. Over half of the questions are industry-specific as SAM is convinced that sector-specific sustainability risks and opportunities play a key role in a firm's long-term success. The other half includes questions on general sustainability issues such as corporate governance, product stewardship and talent attraction & retention.

**Daniel Wild, Head of Research SAM:** *"With the Corporate Sustainability Assessment we look for evidence of companies' awareness of sustainability issues and for indications that they have implemented strategies to address these issues. This will be the 14<sup>th</sup> time we conduct the assessment and we are pleased that each year companies set the bar a little higher. Sustainability changes the competitive environment in which companies operate by presenting opportunities as well as risks. Firms that are not considering how sustainability is affecting their business will fall behind."*

#### **Measuring corporate sustainability in emerging markets\***

Emerging markets are traditionally overlooked when measuring sustainability performance. This year, SAM is incorporating emerging markets into its assessment by inviting an additional 800 companies from 21 countries to participate in the CSA. These companies are highly encouraged to fill in the questionnaire on their sustainability practices.

#### **What is the benefit of participating in SAM's CSA?**

Upon completion of the CSA, many firms use it as an internal management tool to identify gaps and initiate improvements in their business practices. Firms that participate in the CSA also receive a free Company Benchmarking Scorecard that compares their sustainability performance to that of their industry peers. Furthermore, sustainability leaders make it into the DJSI which can enhance a company's reputation and they become potential investments for DJSI-based portfolios.

\* According to Dow Jones Indexes' classification, the following countries are classified as emerging markets: Brazil, Chile, China, Colombia, Czech Republic, Egypt, Hungary, India, Indonesia, Malaysia, Mexico, Morocco, Peru, Philippines, Poland, Russia, South Africa, South Korea, Taiwan, Thailand, and Turkey.

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### About SAM

SAM is an investment boutique focused exclusively on Sustainability Investing. The firm's offering comprises asset management, indexes, private equity and sustainability benchmarking services. Its asset management capabilities include a range of sustainability theme and broad ESG integrated investment strategies catering to institutional asset owners and financial intermediaries internationally. SAM partners with Dow Jones Indexes in the publication of the globally recognized Dow Jones Sustainability Indexes (DJSI). Based on its Corporate Sustainability Assessment, SAM has compiled one of the most comprehensive sustainability databases and analyzes over 2,000 listed companies annually. SAM's proprietary research and sustainability insight - through its direct contact with companies - are fully integrated into its offering.

[SAM](#) is a member of the global pure-play asset manager Robeco, which was established in 1929 and offers a broad range of investment products and services. Robeco is a subsidiary of the Rabobank Group, which has the highest credit rating of all privately owned banks, according to rating agencies Moody's, Standard & Poor's, Fitch and DBRS. Robeco is committed to both practicing and implementing its [Responsible Investing](#) principles group-wide. Within Robeco, SAM acts as the center of expertise for sustainability insight. In its domestic Swiss market, SAM also represents Robeco by handling sales, client services and marketing for Robeco's product range.

SAM was founded in 1995 on the conviction that corporate commitment to sustainability practices enhances a company's capacity to prosper, ultimately creating stakeholder value. As a reflection of its own commitment to advocating sustainable investment practices, SAM is a signatory of the UNPRI and a member of Eurosif, Asria and Ceres. SAM is headquartered in Zurich and employs over 100 professionals. As of December 31 2011, SAM's assets under management and advice amounted to a total of USD 11.4 billion.

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