



**Universität  
Zürich<sup>UZH</sup>**

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# Who Walks the Walk:

## Sustainable Investing in Private Banks

3. September, 2019 | Basel

A woman with dark hair tied back, wearing a light-colored blazer, is smiling and looking towards the right. The background is a blurred office environment. The entire image is overlaid with a semi-transparent blue filter.

# HI, I'M TAEUN

The person at the front here.

Head of Wealth Management Programs

# PARTICIPANTS

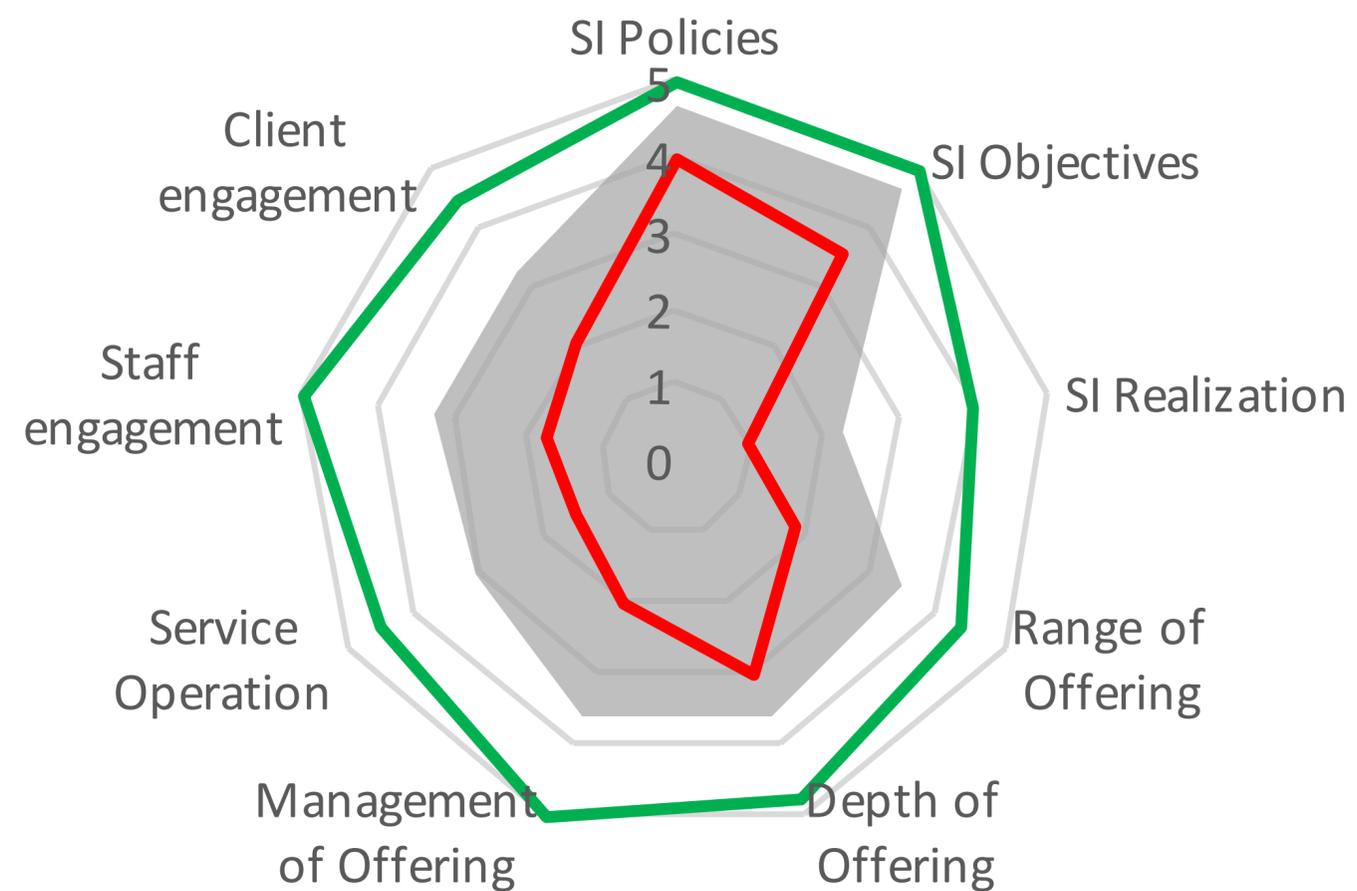
Institutions	WM AuM (billion USD)	HQ	Institutions	WM AuM (billion USD)	HQ
ABN Amro	181.70	Netherlands	Triodos	4.20	Netherlands
BNP Paribas	361.00	France	UBS	2,260.00	Switzerland
Credit Suisse	1,347.30	Switzerland	Vontobel	56.30	Switzerland
Edmond de Rothschild	120.71	Switzerland	ZKB	295.19	Switzerland
Globalance	-	Switzerland	Bank A	-	Switzerland
HSBC	330.00	UK	Bank B	-	Switzerland
Julius Baer	382.10	Switzerland	Bank C	-	UK
LGT	198.20	Liechtenstein	Bank D	-	Germany
Lombard Odier	-	Switzerland	Bank E	-	France
Pictet	210.00	Switzerland	Bank F	-	Denmark

# FRAMEWORK

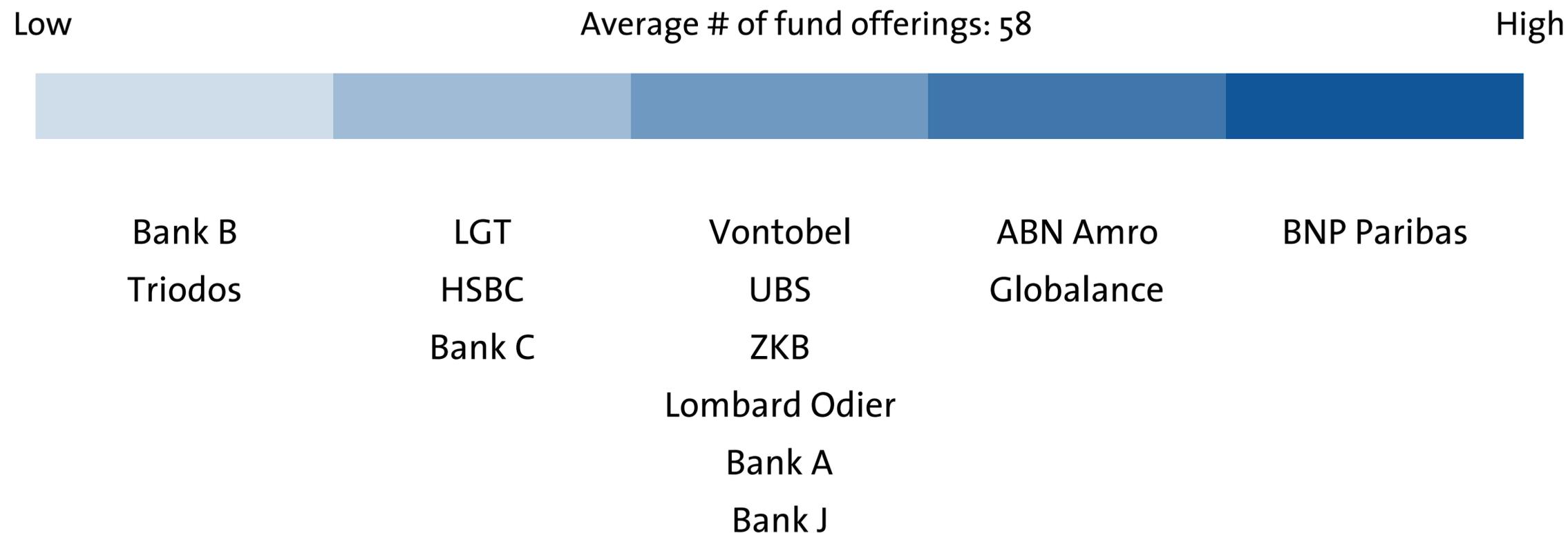


# MARKET STATUS

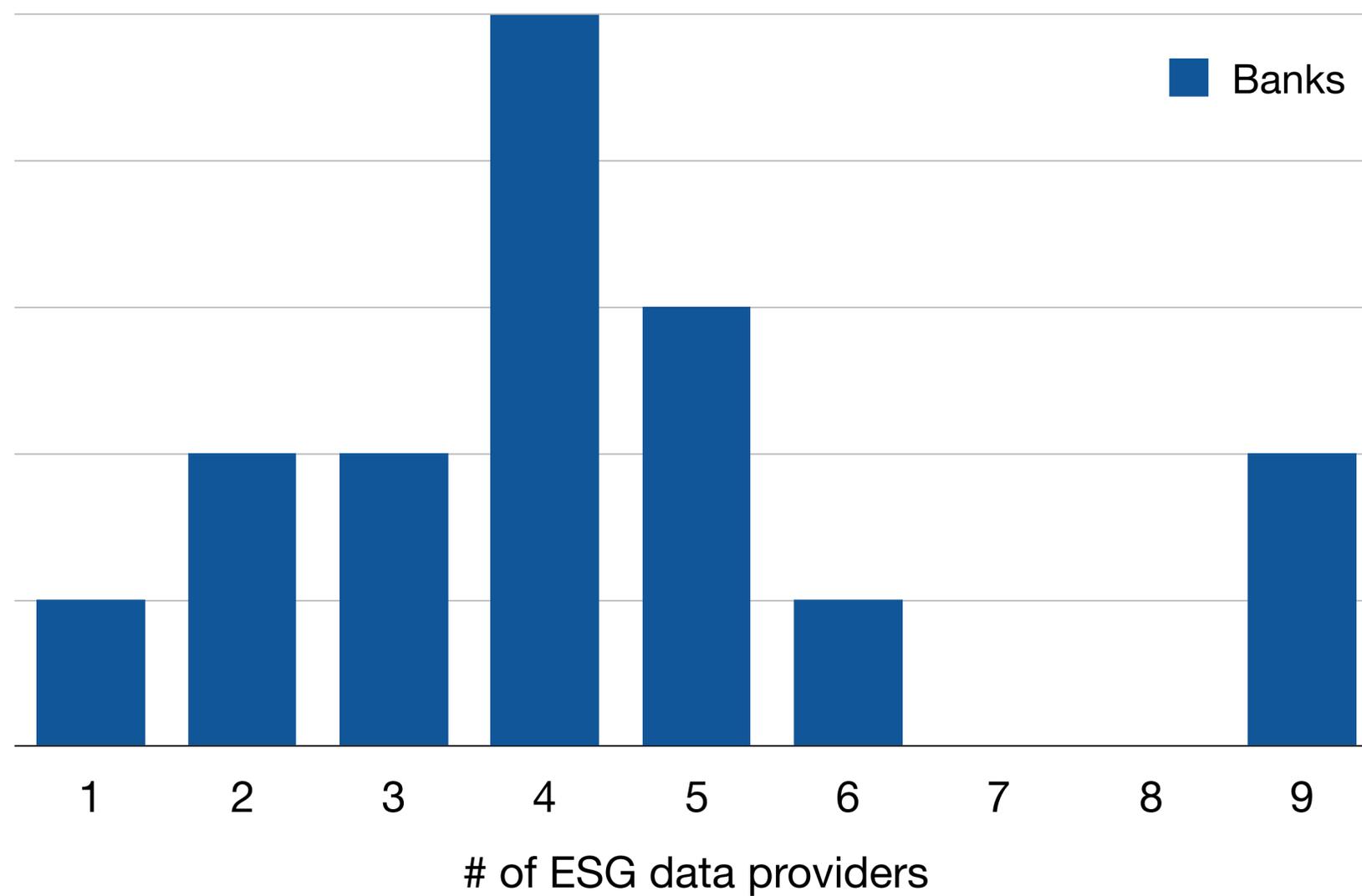
■ Peer Avg.   ■ Highest Rating   ■ Lowest Rating



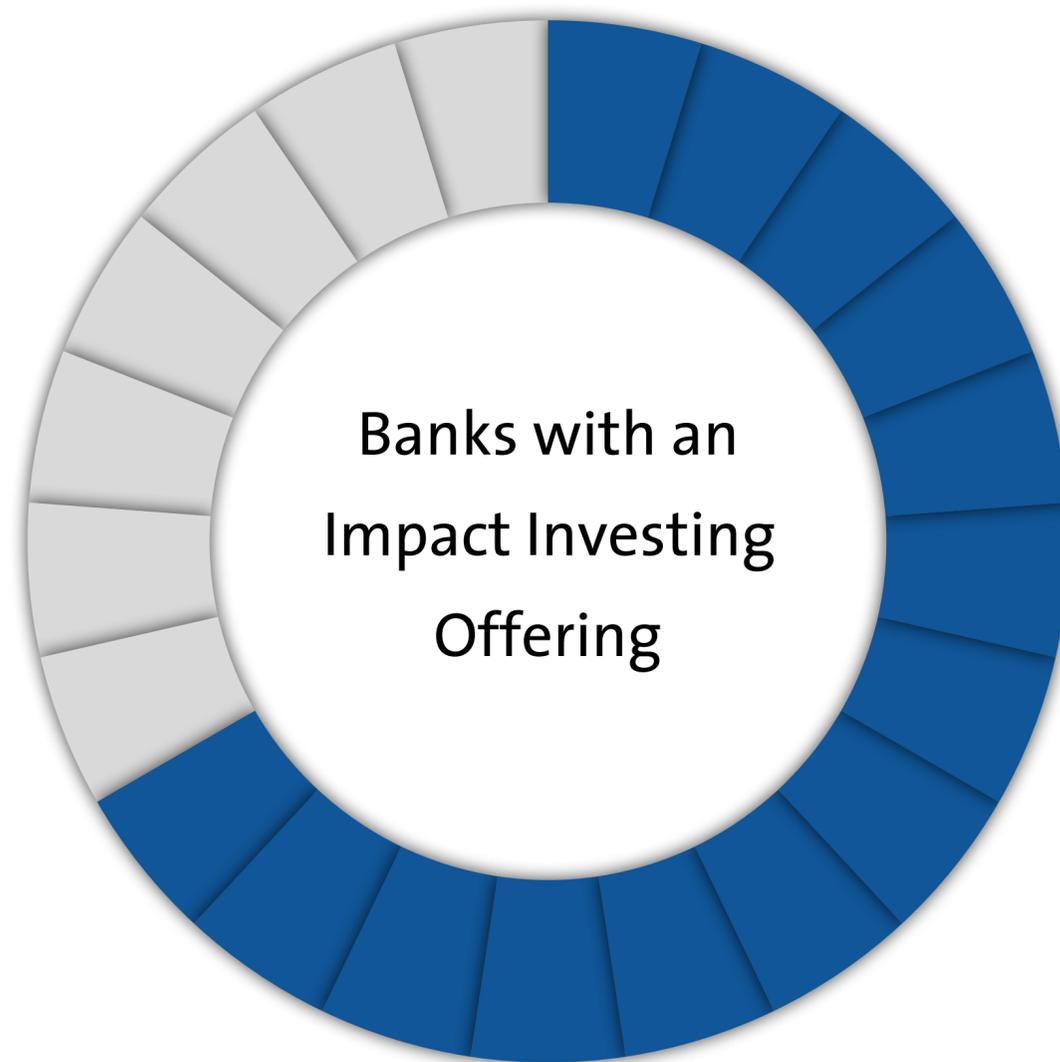
# RANGE OF OFFERINGS | QUANTITY



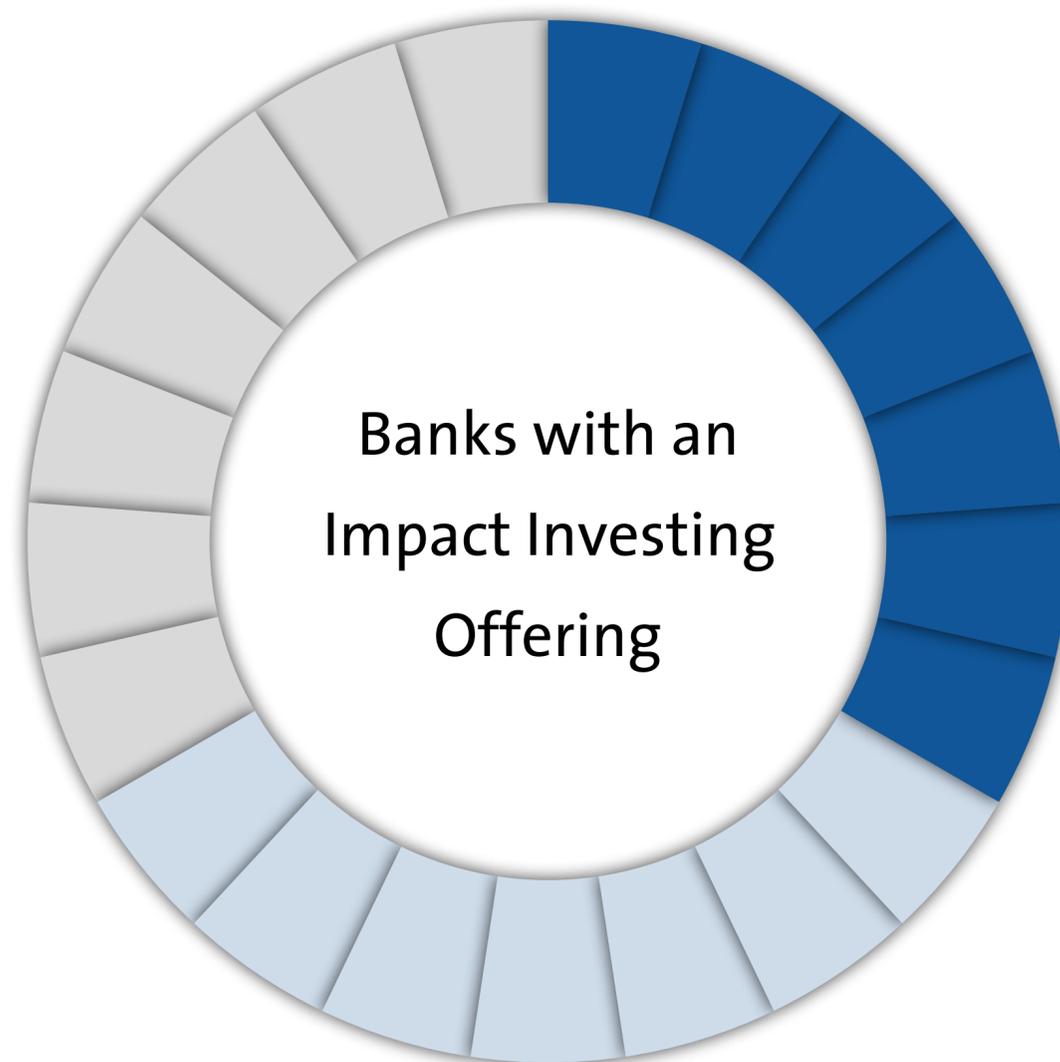
## DEPTH OF PRODUCTS | ESG INTEGRATION



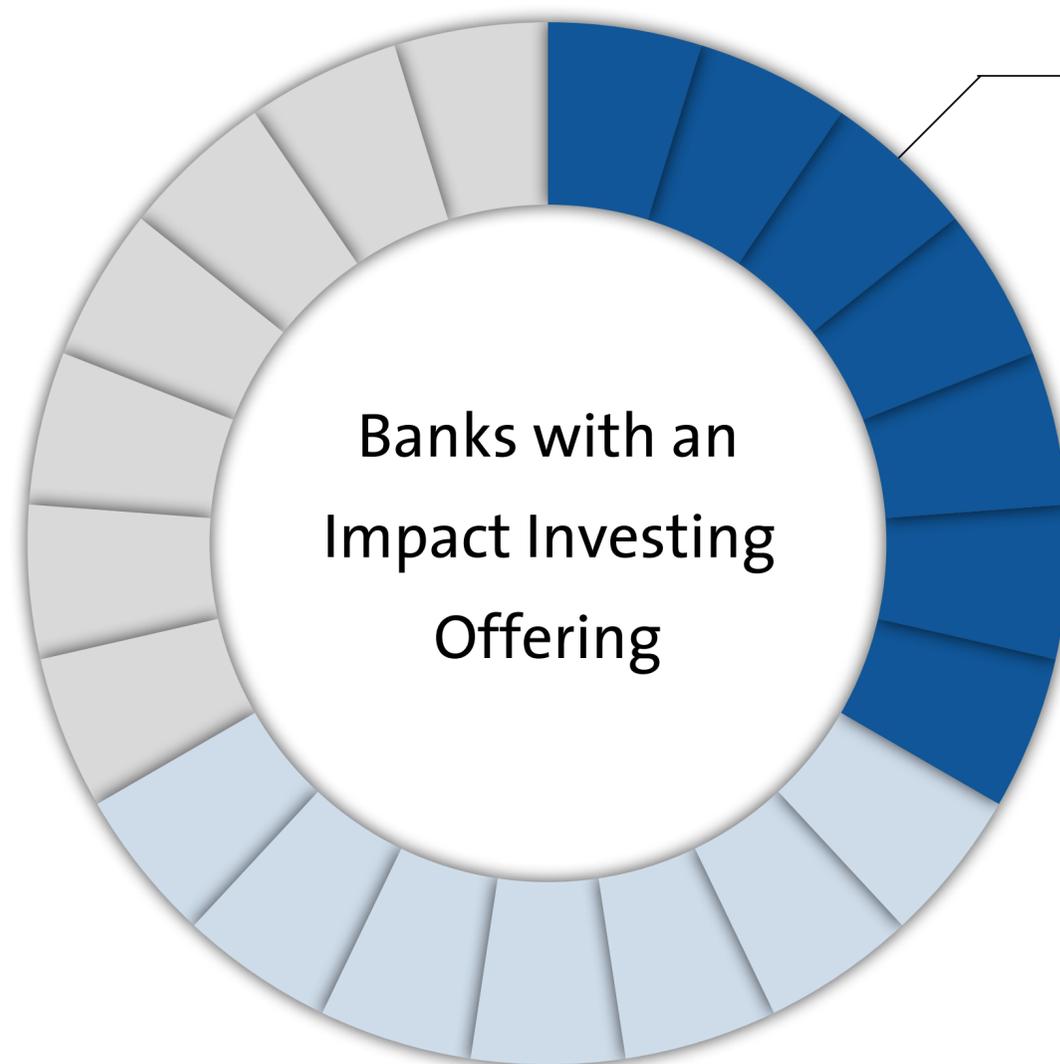
# DEPTH OF PRODUCTS | IMPACT INVESTING



# DEPTH OF PRODUCTS | IMPACT INVESTING



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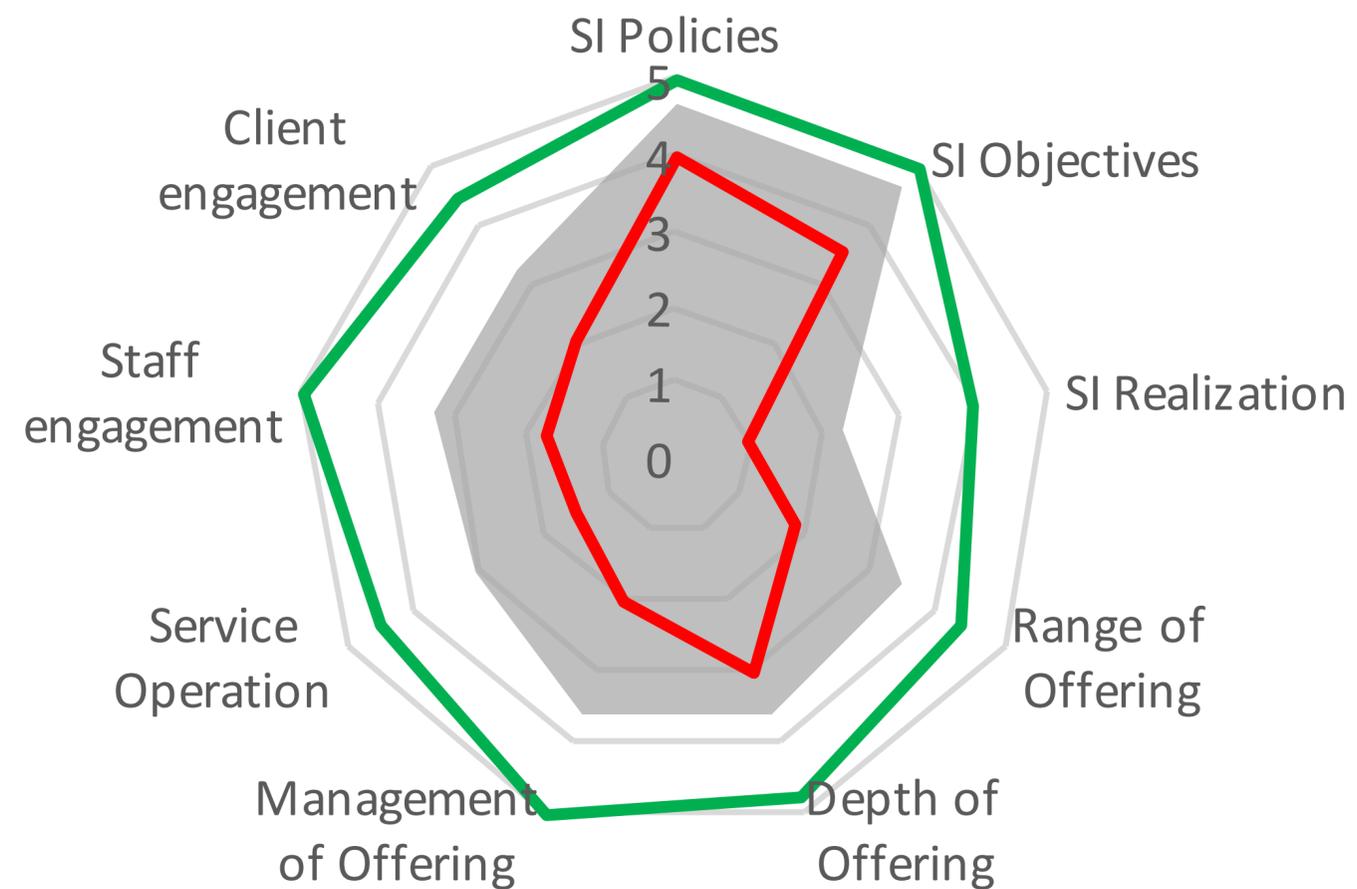


## How?

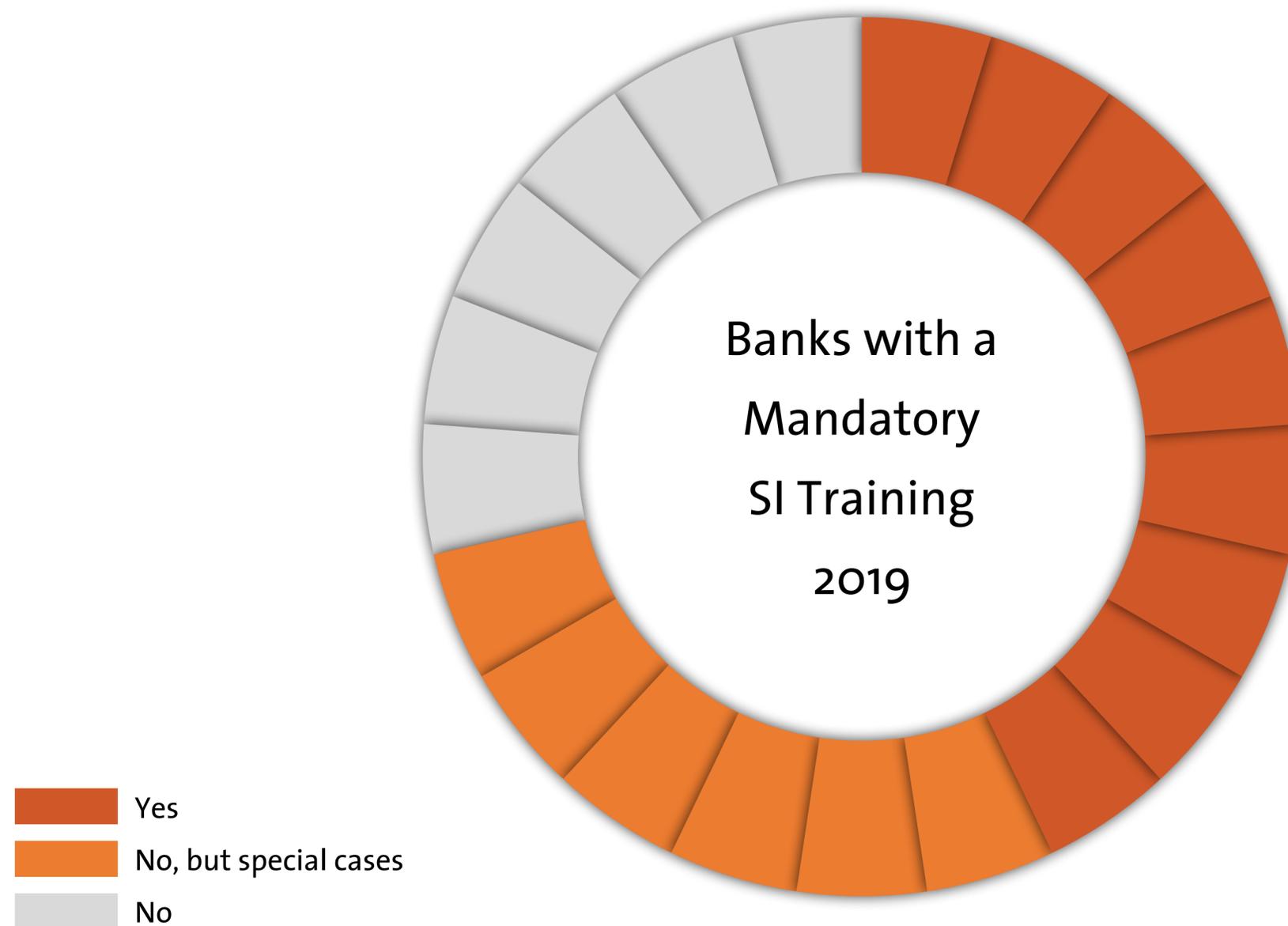
- In-house impact funds
- Exclusive product development & distribution
- In-house selection capabilities
- Work with external advisors for sourcing and selection

# MARKET STATUS

■ Peer Avg.   ■ Highest Rating   ■ Lowest Rating



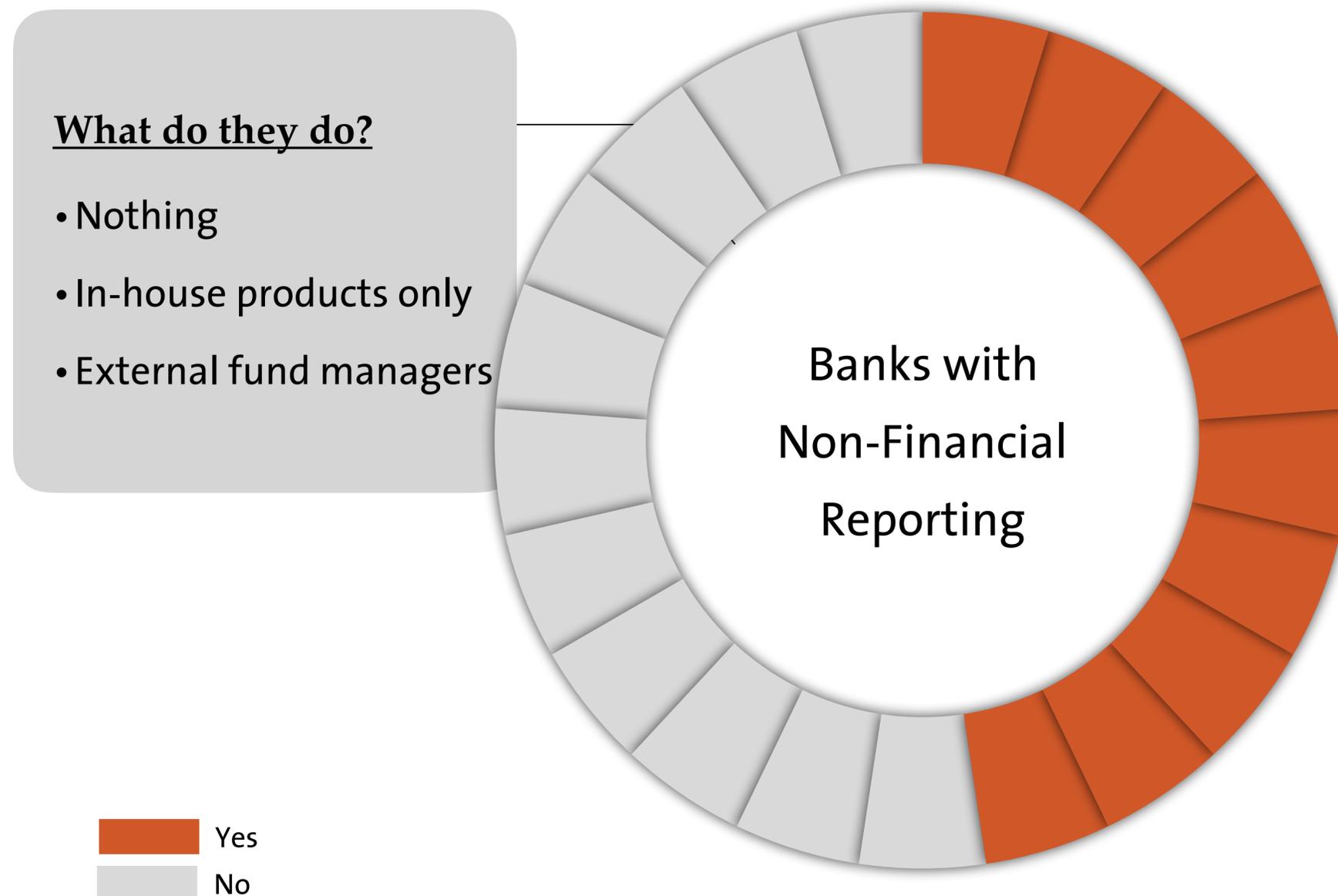
## STAFF ENGAGEMENT | STAFF TRAINING



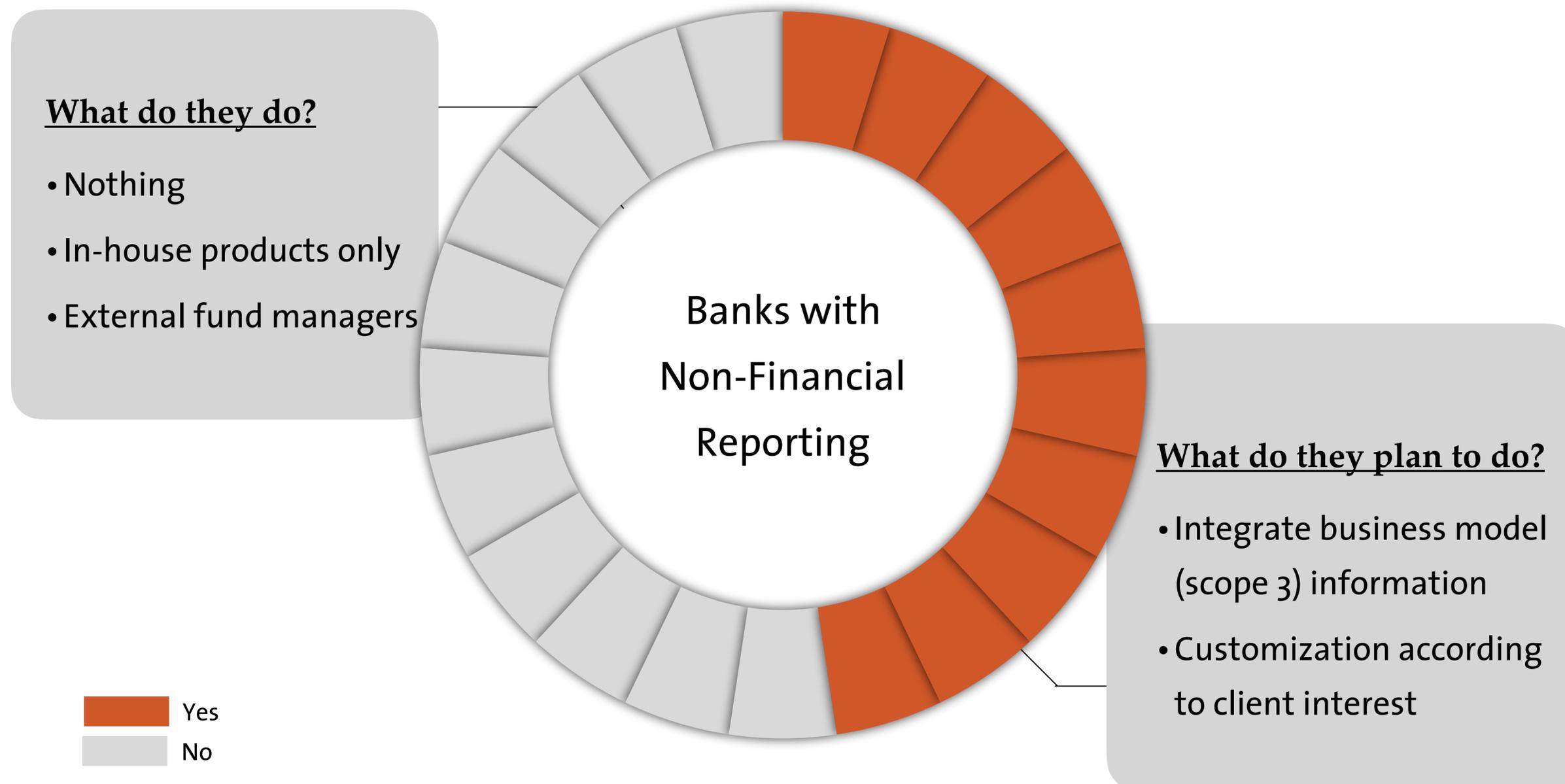
# CLIENT ENGAGEMENT | REPORTING



# CLIENT ENGAGEMENT | REPORTING



# CLIENT ENGAGEMENT | REPORTING



Final report will be published by end of September!

[www.csp.uzh.ch](http://www.csp.uzh.ch)

More on...

Regulatory environment

Active ownership

Impact investing

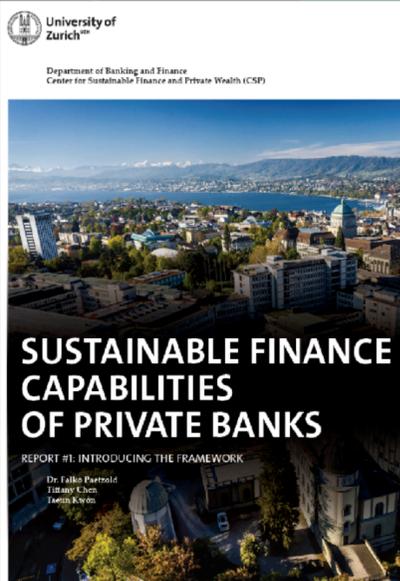
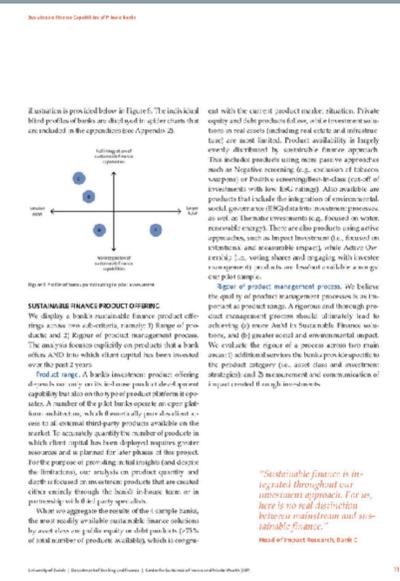
# Appendix

# FRAMEWORK

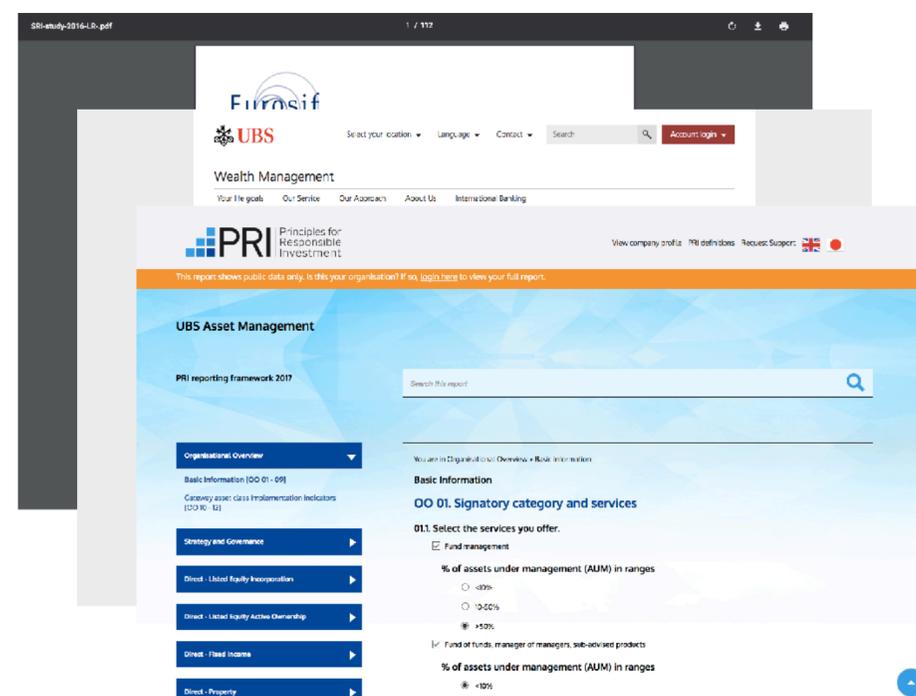
## SOUNDING BOARD

Name	Organization
William Chin	Principal
Tiffany Chen	Principal
Rakesh Chand	Kaura Foundation
Fernando Scodro	Principal
Julia Balandina-Jaquier	JBJ Consult
Peter Wüthrich	VALUEworks
Sebastian Utz	University of St. Gallen
Name not publicly	Principal

## 1st REPORT: INTRODUCING THE FRAMEWORK

# RESEARCH



Data Source	# of Documents
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UN PRI reports	18
Annual reports	142
CSR reports	59
Industry reports	7
Media	16
Other	300+

# About CSP

The Center for Sustainable Finance and Private Wealth (CSP) is the first university unit to focus on mobilizing private wealth toward sustainable development through multidisciplinary research and diffusion of research insights - entirely funded by wealth owners.

