



APPLICATION

GLOBAL INVEST SOCIAL EXCELLENCE – ASSET MANAGERS

Email your application no later than 12 July to Elza Marette (emarette@agefi.fr)

Name of your company

Particulars of the person in charge of the application

Last name

First name

Position

Telephone number

E-mail

TO APPLY FOR THE GLOBAL INVEST SOCIAL EXCELLENCE – ASSET MANAGERS AWARD:

Candidates will have to describe one or more CSR (Corporate Social Responsibility) initiative(s) within their institution (promoting and empowering persons and processes within your organisation) and/or as part of their investments (allocating [new or additional] money & resources to particular asset classes or projects) that are aiming at better social inclusion, through efforts in favour of gender equality & empowering women, representation of ethnic minorities and/or combatting poverty and territorial/geographic inequality.

Could you please specify the means employed, the objectives sought and the results achieved?

In addition to this presentation, the jury would like to have some figures/indicators.

- How do you take social criteria into account in your CSR?
- How many nationalities are represented on your board of directors?
- What is the percentage of women; of foreigners, and/or members of ethno-cultural minorities; of representatives of employee associations, trade unions and labour organizations on your board(s) of directors?
- Do you have a policy in place to promote diversity (gender / social / education) in your recruitment process and career management, including a talent management program?
- Is ESG performance – and, in particular, the social aspect of ESG – part of the criteria affecting the variable remuneration of managers?
- How do you comprehend social issues (gender equality and women’s empowerment, inclusion & integration of ethnocultural minorities and working-class employees, alleviating poverty, notably in impoverished geographic areas/regions, etc.) at both the asset allocation and investment processes levels?
- What part(s) of your assets under management focus(es) specifically/solely on social issues (dedicated funds/mandates)? Do you have plans to extend such an approach to broader asset pools in the next two years?
- How do you control/verify social policy (or lack thereof) of the companies you invest in?
- Do you perform due diligence to ensure that the working conditions in the companies in which you invest are ethical?



RULES

GLOBAL INVEST SOCIAL EXCELLENCE AWARDS

1/ Initiatives covered:

One or more initiatives conducted in a hands-on fashion in the award category under consideration.

2/ How to take part:

All asset owners (insurers, pension funds, sovereign-wealth funds, family offices, foundations or endowments), asset managers and corporates may compete in their category.

To do so, simply describe, for each award under consideration, one or more initiatives conducted in a particular area, by filling out the application.

PDF-format applications are to be emailed no later than Friday 12 July 2019 at 6:00 pm to Elza Murette (emurette@agefi.fr).

3/ Jury membership:

Suzanne Bishopric, Co-founder & Managing Partner, GLOBAL SOVEREIGN ADVISORS (GSA)

Philippe Desfosses, Vice-President, INSTITUTIONAL INVESTORS GROUP ON CLIMATE CHANGE (IIMGCC)

Nicolas Firzli, Managing Director, WORLD PENSION COUNCIL

Annick Masounave, Beat Writer, *L'Agefi Hebdo*, L'AGEFI

Zara Nanu, CEO, GAPSQUARE

Guillaume Prache, Managing Director, BETTER FINANCE

Fiona Reynolds, Managing Director, PRI (PRINCIPLES FOR RESPONSIBLE INVESTMENT)

Ric van WEELDEN, Senior Partner, INDEFI

4/ Prize categories:

- Global Invest Social Excellence – Asset owner
- Global Invest Social Excellence – Asset manager
- Global Invest Social Excellence – Corporate

5/ Timetable:

- Applications accepted from Tuesday, 14 May 2019
- Application submission deadline: Friday, 12 July 2019
- Awarding of prizes: Thursday, 10 October 2019

Email the PDF-format application no later than 12 July to Elza Murette (emurette@agefi.fr), along with the following information:

- Your company's name.
- The particulars of the person in charge of the application (first name, last name, position, telephone number, email address).
- The award(s) that you are applying for.

For any further information, contact Ludivine Garnaud at 33 (0)1 41 27 47 83 or at lgarnaud@agefi.fr