

The Responsible Investment Review 2019



How Environmental, Social & Governance
Factors and Positive Impact Investing
are Reshaping the Investment Landscape



The Responsible Investment Review

How asset managers,
investors and other
market players
are responding to
a changing world

Introducing the report

The **Responsible Investment Review** is Research in Finance's annual written report into the fast-developing Environmental, Social and Governance (ESG) and broader responsible investing market. The first issue is due for publication in spring 2019 and will include insight from all angles:

- Surveys measuring appeal, preferences and take-up among professional and private investors
- Deep-dive commentary from industry experts, including fund ratings agencies, fund buyers, fund managers and stewardship specialists
- Analysis of ESG/responsible assets, flows and performance
- Comprehensive review of government regulation and trade association guidance supporting the growth of ESG investing
- Findings-led predictions on the growth potential for responsible investing

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What will be covered?

The **Responsible Investment Review** will cover a range of topics and aims to answer the most pressing questions on the subject, including:

- What sorts of ESG and socially responsible funds and managed portfolio services are on offer in the UK?
- What proportion of investors really understand what ESG is, and how it differs from types of socially responsible or impact investing?
- What are pension consultants, wealth managers and advisers doing to educate clients?
- What proportion of investors buy /recommend responsible funds?
- How do the biggest retail and institutional investors approach this area?
- To what degree are these funds making it into mainstream client portfolios?
- What are the preferred approaches to ESG investing? Engagement vs. divestment?
- Which asset managers are seen to be ESG leaders and what are they doing right?
- Which ESG and SRI ratings and services exist, and what impact have these had on investor behaviour?
- What has the UK government done to promote ESG investing to date? What is on the horizon?

Who should read this report?

The **Responsible Investment Review** will help:

- Asset management marketeers understand what messaging and support is most valued by investors and potential investors in this area
- Sales managers improve how effectively they communicate on responsible investing products to investors and gatekeepers
- Product specialists assess ESG and responsible investing product development opportunities
- Wealth managers get a better sense of potential client demand and hone their propositions
- Consultants understand the attitudes of pension scheme managers and trustees, and improve their advice and training accordingly
- Government agencies and regulatory bodies get to grips with awareness and demand in the market, and identify priority areas for policy and guidance

About Research in Finance

Research in Finance is a market leading consultancy, research and publishing business that is about implementing change and making a difference. We work with some of the largest and most important companies in the world. With more than 60 years' cumulative experience across the wholesale, institutional and private investor markets, we believe our in-depth knowledge makes us unique and an invaluable partner with any business working in the sector.

The Research in Finance team has expertise across a range of quantitative and qualitative research methodologies, conducting everything from brand tracking and segmentation analysis to in-depth interviews, focus groups and online diary projects. We help financial services companies to refine their sales strategies, improve their marketing and communications, understand how they are perceived by their target market, test new product ideas and creative, benchmark against their peers and gain a deeper understanding of the markets in which they operate. In addition to a series of established syndicated studies, we design bespoke research around clients' specific needs, tapping into our in-house panels of engaged professional and private investors.

For more information on the report and how to become a subscriber, please contact

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