



# RobecoSAM Percentiles Database and how to get full value from it

12<sup>th</sup> October 2016 9:30am BST



# Introduction – Your Presenters



Robert Dornau  
Sr. Manager Sustainability Services  
**RobecoSAM**



Peter Truesdale  
Director  
**Corporate Citizenship**

# Who we are

## Corporate Citizenship

- Global business consulting company specializing in sustainability and corporate responsibility.
- Established in 1997.
- Teams based in London, New York, San Francisco, Santiago and Singapore.
- Help companies achieve commitments to responsible business
- Worked in more than 45 countries.
- Published more than 40 [thought leadership papers](#) and host events.



## RobecoSAM

- Investment specialist in Sustainability Investing.
- Founded in 1995.
- Headquartered in Zurich.
- 130 professionals.
- Asset management, indices, engagement, voting, impact analysis, sustainability assessments, and benchmarking services.
- Together with S&P Dow Jones Indices, RobecoSAM publishes the globally recognized Dow Jones Sustainability Indices (DJSI).

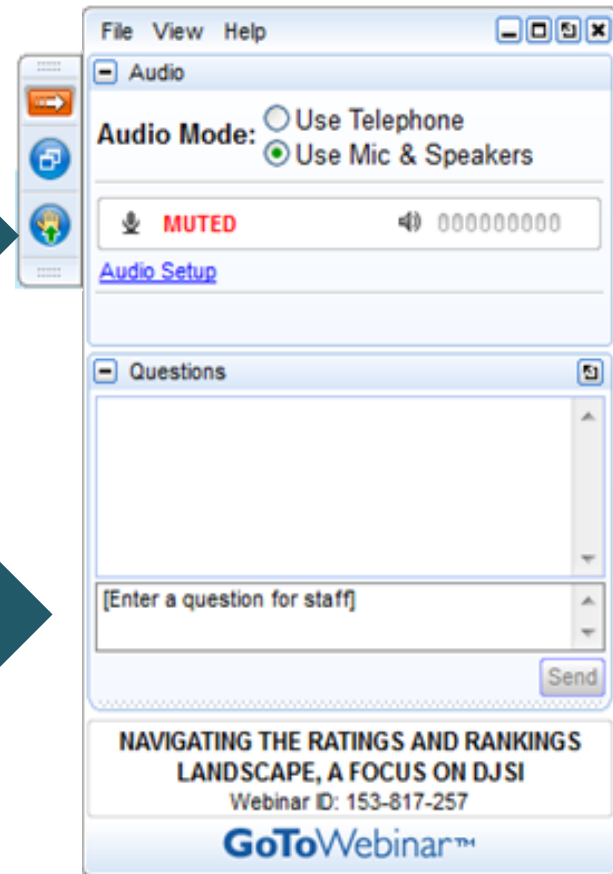
# Agenda

## RobecoSAM

- Motivation to make percentile rankings public
- What is shared? What is not shared?
- Value of Bloomberg as a partner
- How to access RobecoSAM percentile ranks on Bloomberg
- Demo of RobecoSAM benchmarking database (Basic and Premium Version)

## Corporate Citizenship

- Value of this new level of transparency
- Wealth of data – what can you read from it?



# RobecoSAM CSA data for investors and companies

Robert Dornau  
Zurich, Oct 12 2016



## Introduction

**RobecoSAM and Bloomberg teamed up to make the results of the Corporate Sustainability Assessment (CSA) available to the global investment community**

RobecoSAM made **the percentile rankings** of the scores of the CSA available to all licensed Bloomberg users.

Assessed companies can access the same information and more via our new online benchmarking database.

## Why has RobecoSAM decided to this?

### **Increase the relevance of the CSA to the broader investment community**

- be more **transparent** about the results of the CSA – to **companies** and to **investors**, helping to improve the credibility and utility of the CSA
- **Companies** have increasingly informed RobecoSAM that they would like the results of the CSA to be more visible to investors. A survey conducted by RobecoSAM in the fall of 2015 showed that the vast majority of companies favored increased disclosure around CSA results.
- **Investors** increasingly would like to know more about the CSA beyond DJSI membership and the Sustainability Yearbook. As the leading sustainability assessment, we would like to make the results of the CSA available to a wider scope of users.

## What are the benefits to companies?

### **Companies can benefit from increased use of the results of the CSA, beyond RobecoSAM's own investment products and the Dow Jones Sustainability Indices**

- An increasing number of analysts access sustainability ratings and rankings through Bloomberg
- Companies can now demonstrate
  - Their leading **sustainability performance** to the global investment community – increasing the return on their investment into completing the CSA
  - That they **are among the most sustainable companies** within their industry
- Investor relations personnel can now more easily **answer questions** about a company's DJSI ranking when speaking to analysts and investors
- Sustainability officers can get **additional buy-in** from senior management in demonstrating the external benefits of the CSA in order to improve their sustainability practices



## What information is shared?

	<b>Bloomberg</b>	<b>RobecoSAM Benchmarking Database</b>
<b>Access</b>	Bloomberg licensees	Companies invited to participate in RobecoSAM's CSA
<b>Data</b>	<b>Relative ranks</b> of companies within their industry (percentile ranks)	<b>Relative ranks, absolute ranks</b> as well as 4-year trend for <b>score of own company</b> against <b>industry score distribution</b>
<b>Coverage</b>	All 60 industries	Company's own industry
<b>Depth</b>	Total and dimension (Criteria as of Dec '16)	Total, dimension, criteria

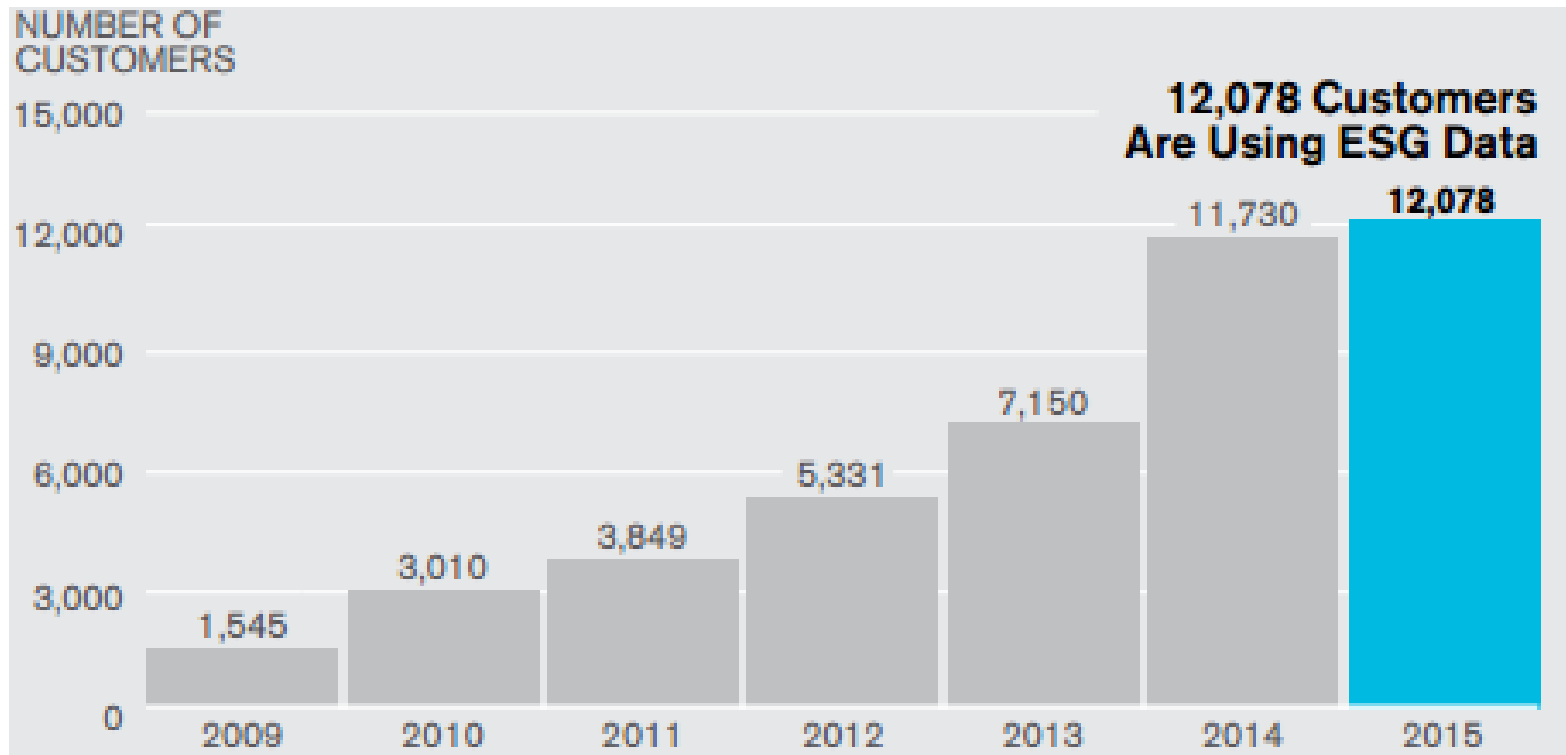
## What information will RobecoSAM not be sharing?

RobecoSAM will **NOT** share the following information:

- **Company answers, data points, comments, documents** or any other confidential information collected through the CSA. The **confidentiality of information** is covered by RobecoSAM's Use of Information Policy & Confidentiality of Documents Policy
- **Any historical ranking results prior to 2016.** From 2016 onwards, the intention is to keep historical information for improved comparability

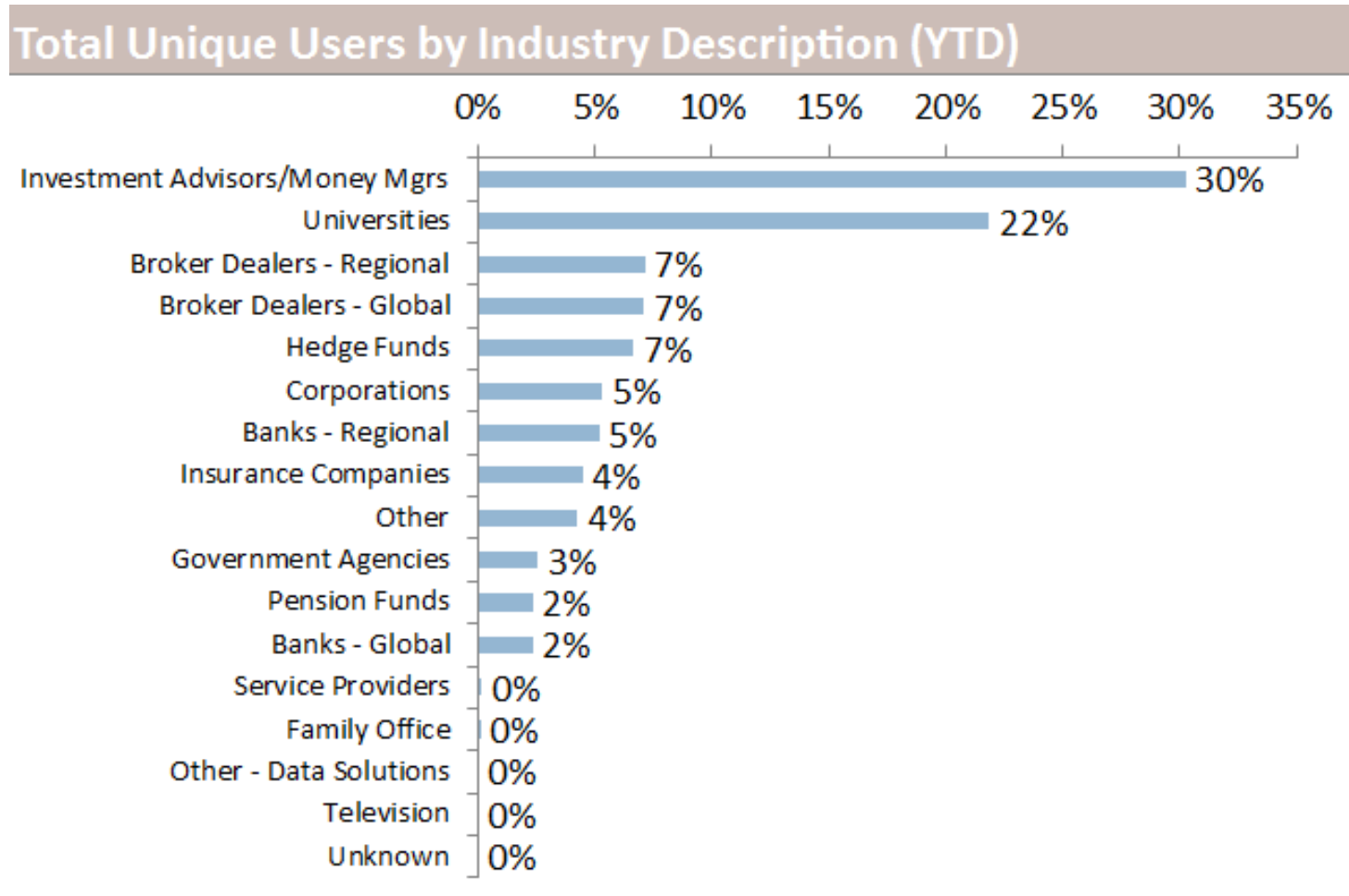
## Bloomberg ESG integration

Company ESG data is integrated seamlessly into critical portfolio management and security analysis screens.



Source: Bloomberg

## Mainstream investment use case



Source: Bloomberg

# What does it look like?

## RobecoSAM data on Bloomberg (1/3)

RobecoSAM scores are available on the ESG company analysis page.

### ESG <GO>

IBM US Equity		99) Export to Excel		Environmental, Social & Governance Analysis					
International Business Machines Corp				History 5 Years		Currency USD			
Summary	vs History	vs Peers	97) ESG Scores   RV ESG »						
Environmental	Better	Worse	RobecoSAM Rank	69	ISS Quickscore	6			
Social	Worse	Worse	Sustainalytics Rank	95.2	CDP Climate Score	4			
Governance	Worse	Worse	Bloomberg ESG Disclosure	47.5					
Metrics	vs History			vs Peers					
	Current	History	Change	Low	Range	High	Median	Difference	History
1) Environmental									
11) GHG/Revenue	24.8		-0.7 B	11.9		29.6	19.4	5.4 W	
2) Social									
21) Women Empls Mgmt Ratio	0.84		-0.02 W	0.6		0.6	0.6	0.24 B	
22) Women Employees %	31.4		2.9 B	28.2		33	33	-1.6 W	
23) Employee Turnover %	--		--	18.1		21.5	19.8	--	
24) Employees Unionized %	--		--	0		14	0	--	
25) Lost Time Incident Rate	0.17		0.04 W	0.02		0.06	0.04	0.13 W	
3) Governance									
31) Independent Directors %	85.7		-6 W	63.6		92.3	86.1	-0.3 W	
32) Women Directors %	21.4		4.8 B	0		38.5	12.7	8.7 B	
33) Director Avg Age	65		1 W	54		67	58	7 W	
34) Director Meeting Attd %	97		22 B	73.6		92	75	22 B	
35) Board Size	14		2 W	6		14	10	4 W	

Source: Bloomberg

## RobecoSAM data on Bloomberg (1/3)

RobecoSAM scores are available on the ESG company analysis page.

### ESG <GO>

IBM US Equity		99) Export to Excel		Environmental, Social & Governance Analysis					
International Business Machines Corp				History 5 Years		Currency USD			
Summary		vs History		97) ESG Scores   RV ESG »					
Environmental	Better			RobecoSAM Rank	69	ISS Quickscore	6		
Social	Worse			Sustainalytics Rank	95.2	CDP Climate Score	4		
Governance	Worse	Worse		Bloomberg ESG Disclosure	47.5				
Metrics	vs History			vs Peers					
	Current	History	Change	Low	Range	High	Median	Difference	History
1) Environmental									
11) GHG/Revenue	24.8		-0.7 B	11.9		29.6	19.4	5.4 W	
2) Social									
21) Women Empls Mgmt Ratio	0.84		-0.02 W	0.6		0.6	0.6	0.24 B	
22) Women Employees %	31.4		2.9 B	28.2		33	33	-1.6 W	
23) Employee Turnover %	--		--	18.1		21.5	19.8	--	
24) Employees Unionized %	--		--	0		14	0	--	
25) Lost Time Incident Rate	0.17		0.04 W	0.02		0.06	0.04	0.13 W	
3) Governance									
31) Independent Directors %	85.7		-6 W	63.6		92.3	86.1	-0.3 W	
32) Women Directors %	21.4		4.8 B	0		38.5	12.7	8.7 B	
33) Director Avg Age	65		1 W	54		67	58	7 W	
34) Director Meeting Attd %	97		22 B	73.6		92	75	22 B	
35) Board Size	14		2 W	6		14	10	4 W	

Source: Bloomberg

## RobecoSAM data on Bloomberg (2/3)

RobecoSAM scores across industry peers

### ESG <GO>

Segment		Revenue %	Metric	IBM	Low	Comp Range	High
• Whole Firm	100%		Est P/E Current Yr	11.40	8.59		69.54
• IT Services	58%		EV/Est Sales Cur...	2.17	0.55		9.58
• Infrastructure Softw...	30%		Sales Growth Yo...	-11.91	-12.46		30.65
• Computer Hardware...	9%		EBITDA Margin (%)	25.79	7.54		42.14
• Commercial Finance	2%		Revenue per Em...	216.39k	56.00k		1.53M

Name (BICS Best Fit)	RobecoSAM Tot Sustain Rnk	RobecoSAM Econ Dim Rnk	RobecoSAM Environ Dim Rnk	RobecoSAM Soc Dim Rnk
100) INTL BUSINESS MAC...	69.00	65.00	80.00	65.00
101) HEWLETT PACKARD E...	100.00	100.00	75.00	100.00
102) HP INC	95.00	95.00	65.00	95.00
103) XEROX CORP	85.00	81.00	89.00	83.00
104) COMPUTER SCIENCES...	78.00	93.00	69.00	70.00
105) ORACLE CORP	74.00	68.00	77.00	68.00
106) COGNIZANT TECH SO...	57.00	48.00	67.00	56.00
107) CITRIX SYSTEMS INC	35.00	48.00	29.00	35.00
108) NETAPP INC	20.00	45.00	15.00	25.00
109) CDW CORP/DE	--	--	--	--

(Accounting adjustments: Adjusted for abnormal items, when applicable)



## RobecoSAM data on Bloomberg (2/3)

RobecoSAM scores across industry peers

### RV ESG <GO>

Segment	Revenue %	Metric	IBM	Low	Comp Range	High
Whole Firm	100%	Est P/E Current Yr	11.40	8.59		69.54
IT Services	58%	EV/Est Sales Cur...	2.17	0.55		9.58
Infrastructure Softw...	30%	Sales Growth Yo...	-11.91	-12.46		30.65
Computer Hardware...	9%	EBITDA Margin (%)	25.79	7.54		42.14
Commercial Finance	2%	Revenue per Em...	216.39k	56.00k		1.53M

Name (BICS Best Fit)	RobecoSAM Tot Sustain Rnk	RobecoSAM Econ Dim Rnk	RobecoSAM Environ Dim Rnk	RobecoSAM Soc Dim Rnk
100) INTL BUSINESS MAC...	69.00	65.00	80.00	65.00
101) HEWLETT PACKARD E...	100.00	100.00	75.00	100.00
102) HP INC	95.00	95.00	65.00	95.00
103) XEROX CORP	85.00	81.00	89.00	83.00
104) COMPUTER SCIENCES...	78.00	93.00	69.00	70.00
105) ORACLE CORP	74.00	68.00	77.00	68.00
106) COGNIZANT TECH SO...	57.00	48.00	67.00	56.00
107) CITRIX SYSTEMS INC	35.00	48.00	29.00	35.00
108) NETAPP INC	20.00	45.00	15.00	25.00
109) CDW CORP/DE	--	--	--	--

(Accounting adjustments: Adjusted for abnormal items, when applicable)

## RobecoSAM data on Bloomberg (3/3)

RobecoSAM scores for all companies in an index or portfolio

**EQS <GO>**

97) Output		98) Actions		99) Backtest		Equity Screening: Results			
						# Securities	505	As Of	09/16/2016
Add Column						92) Fields			
Group By						None	94) Stats...		
		Ticker		Short Name	RobecoSAM Tot Sustain Rnk	RobecoSAM Econ Dim Rnk	RobecoSAM Environ Dim Rnk	RobecoSAM Soc Dim Rnk	
1)	✓	MMM	US	3M CO	93.00	93.00	89.00	86.00	
2)	✓	ABT	US	ABBOTT LABS	100.00	100.00	97.00	100.00	
3)	✓	ABBV	US	ABBVIE INC	100.00	100.00	100.00	100.00	
4)	✓	ACN	US	ACCENTURE PLC-A	76.00	72.00	72.00	81.00	
5)	✓	ATVI	US	ACTIVISION BLIZZ	16.00	23.00	29.00	6.00	
6)	✓	AYI	US	ACUITY BRANDS	13.00	19.00	25.00	13.00	
7)	✓	ADBE	US	ADOBE SYS INC	94.00	94.00	97.00	90.00	
8)	✓	AAP	US	ADVANCE AUTO PAR	11.00	8.00	26.00	26.00	
9)	✓	AES	US	AES CORP	74.00	75.00	61.00	74.00	
10)	✓	AET	US	AETNA INC	79.00	67.00	79.00	81.00	
11)	✓	AMG	US	AFFIL MANAGERS	7.00	16.00	20.00	7.00	
12)	✓	AFL	US	AFLAC INC	51.00	52.00	47.00	58.00	
13)	✓	A	US	AGILENT TECH INC	100.00	100.00	100.00	89.00	
14)	✓	APD	US	AIR PRODS & CHEM	74.00	79.00	66.00	71.00	
15)	✓	AKAM	US	AKAMAI TECHNOLOG	67.00	70.00	76.00	59.00	
16)	✓	ALK	US	ALASKA AIR GROUP	67.00	72.00	56.00	78.00	
17)	✓	ALB	US	ALBEMARLE CORP	17.00	23.00	17.00	16.00	
18)	✓	AA	US	ALCOA INC	100.00	67.00	100.00	67.00	
19)	✓	ALXN	US	ALEXION PHARM	47.00	65.00	41.00	47.00	
20)	✓	ALLE	US	ALLEGION PLC	15.00	8.00	15.00	8.00	

Source: Bloomberg

# **Let's look at RobecoSAM's benchmarking database**

**Live demo (This slide will  
not be shown)**

## Disclaimer

**No warranty** This publication is derived from sources believed to be accurate and reliable, but neither its accuracy nor completeness is guaranteed. The material and information in this publication are provided "as is" and without warranties of any kind, either expressed or implied. RobecoSAM AG and its related, affiliated and subsidiary companies disclaim all warranties, expressed or implied, including, but not limited to, implied warranties of merchantability and fitness for a particular purpose. Any opinions and views in this publication reflect the current judgment of the authors and may change without notice. It is each reader's responsibility to evaluate the accuracy, completeness and usefulness of any opinions, advice, services or other information provided in this publication.

**Limitation of liability** All information contained in this publication is distributed with the understanding that the authors, publishers and distributors are not rendering legal, accounting or other professional advice or opinions on specific facts or matters and accordingly assume no liability whatsoever in connection with its use. In no event shall RobecoSAM AG and its related, affiliated and subsidiary companies be liable for any direct, indirect, special, incidental or consequential damages arising out of the use of any opinion or information expressly or implicitly contained in this publication.

**Copyright** Unless otherwise noted, text, images and layout of this publication are the exclusive property of RobecoSAM AG and/or its related, affiliated and subsidiary companies and may not be copied or distributed, in whole or in part, without the express written consent of RobecoSAM AG or its related, affiliated and subsidiary companies.

**No Offer** The information and opinions contained in this publication constitutes neither a solicitation, nor a recommendation, nor an offer to buy or sell investment instruments or other services, or to engage in any other kind of transaction. The information described in this publication is not directed to persons in any jurisdiction where the provision of such information would run counter to local laws and regulation.

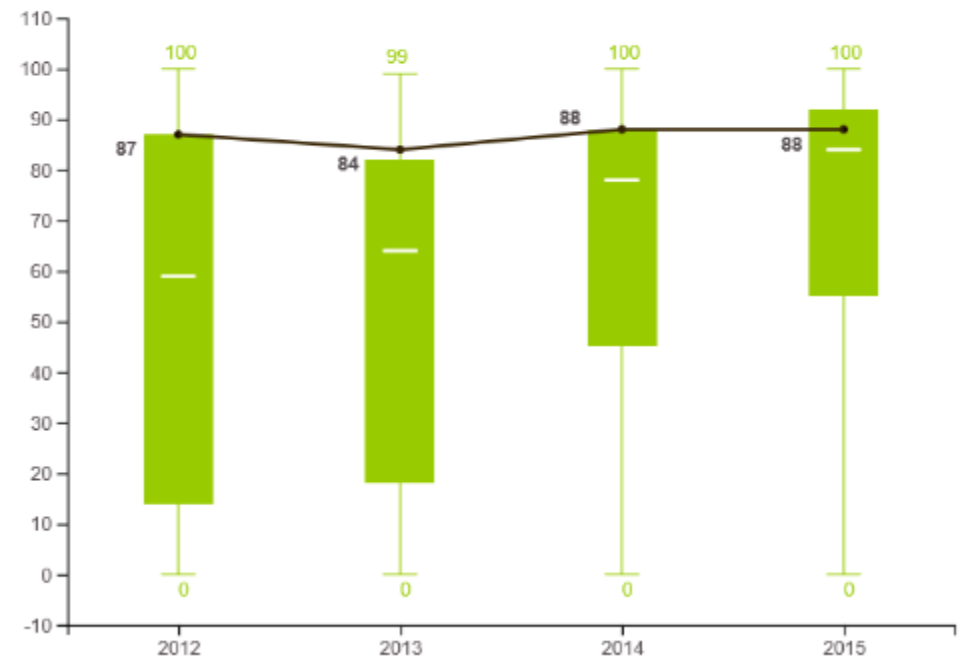
© 2016 RobecoSAM AG

# Premium Version – Overview of Climate Strategy World

## Environmental Dimension - Climate Strategy

Rank	Percentile	Company Name
1	100	Dow Chemical Co
1	100	Johnson Matthey PLC
1	100	Novozymes A/S
4	96	Air Liquide SA
4	96	Clariant AG
<a href="#">Show All</a>		
22	69	Showa Denko KK
24	66	DIC Corp
<b>24</b>	<b>66</b>	<b>Test CHM Corp</b>
26	63	Asahi Kasei Corp
27	61	Air Products & Chemicals Inc

## Sustainability scores: Company vs. Industry



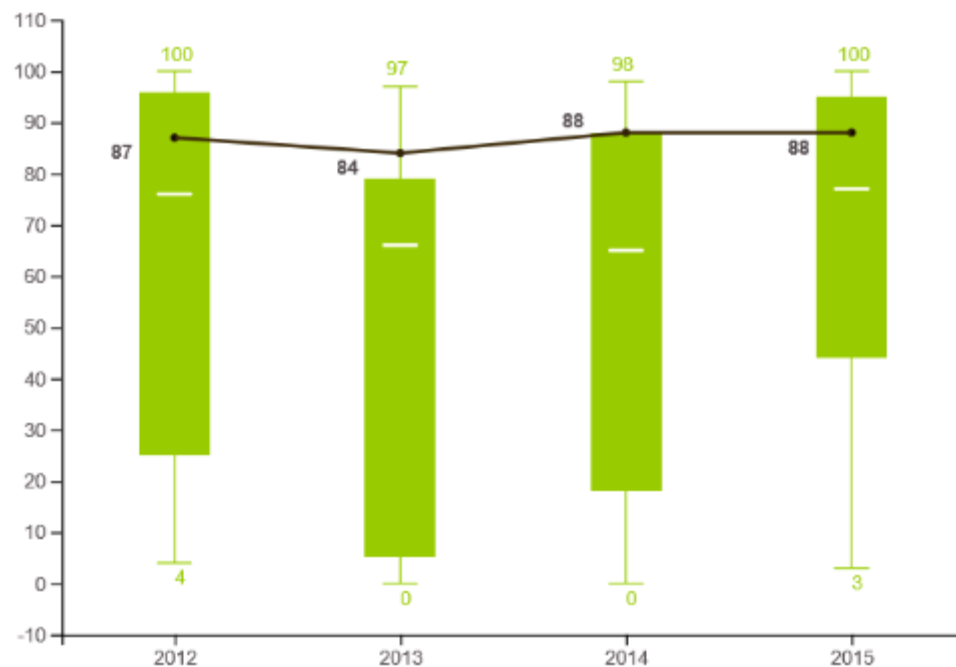
# Premium Version – Overview of Climate Strategy North America

## Environmental Dimension - Climate Strategy

Rank	Percentile	Company Name
1	100	Dow Chemical Co
2	91	Ecolab Inc
3	85	Mosaic Co
4	82	EI du Pont de Nemours & Co
5	81	Praxair Inc
<b>6</b>	<b>66</b>	<b>Test CHM Corp</b>
7	61	Air Products & Chemicals Inc
8	57	Sigma-Aldrich Corp
9	52	Agrium Inc
10	46	Monsanto Co

[Show All](#)

## Sustainability scores: Company vs. Industry



# Premium Version – Overview of Supply Chain Management World

## Economic Dimension - Supply Chain Management

Rank	Percentile	Company Name
1	100	Akzo Nobel NV
2	99	Koninklijke DSM NV
3	97	Linde AG
4	96	Praxair Inc
5	94	Clariant AG
<a href="#">Show All</a>		
11	85	Air Liquide SA
12	84	BASF SE
<b>13</b>	<b>82</b>	<b>Test CHM Corp</b>
14	81	Novozymes A/S
15	79	Ecolab Inc

## Sustainability scores: Company vs. Industry



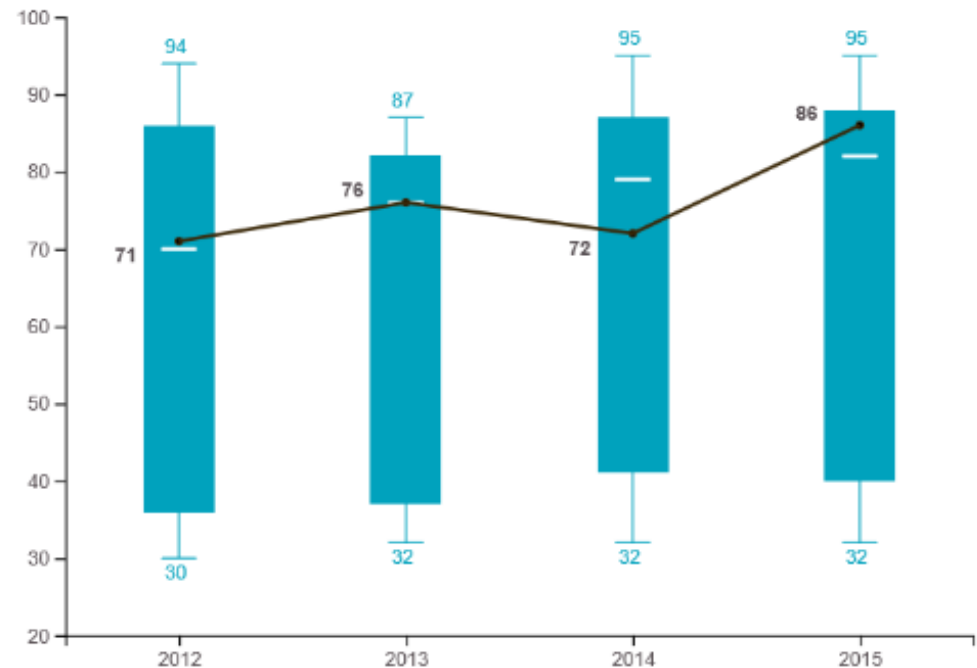


# Premium Version – Overview of Supply Chain Management Europe

## Economic Dimension - Supply Chain Management

Rank	Percentile	Company Name
1	100	Akzo Nobel NV
2	99	Koninklijke DSM NV
3	97	Linde AG
4	94	Clariant AG
5	88	Evonik Industries AG
<a href="#">Show All</a>		
7	85	Air Liquide SA
8	84	BASF SE
9	82	<b>Test CHM Corp</b>
10	81	Novozymes A/S
11	75	Umicore SA

## Sustainability scores: Company vs. Industry



# Q&A Session

Thanks for joining

# Contact us



For further information please contact:

**Peter Truesdale – Director**

E: [peter.truesdale@corporate-citizenship.com](mailto:peter.truesdale@corporate-citizenship.com)

T: +44 (0) 207 861 1616

W: [www.corporate-citizenship.com](http://www.corporate-citizenship.com)

E: [mail@corporate-citizenship.com](mailto:mail@corporate-citizenship.com)

Twitter: @CCitizenship

LinkedIn: [Corporate Citizenship Company Page](#)

**London Office**

Holborn Gate, 5th Floor  
26 Southampton  
Buildings  
London WC2A 1PQ  
United Kingdom

T: +44 (0)20 7861 1616

**Melbourne Office**

LBG Australia & New Zealand  
Suite 5.04, Level 5,  
20 – 22 Albert Road  
South Melbourne, VIC 3205  
Australia

T: + 61 (3) 9993 0452

**New York Office**

241 Centre Street  
4th Floor  
New York, NY 10013  
United States

T: 1-212-226-3702

**San Francisco Office**

901 Mission Street  
Suite 105  
San Francisco, CA 94103  
United States

T: 1-415-416-9580

**Santiago Office**

Av. Kennedy 5735  
Oficina 1503  
Santiago  
Chile

T: +56 (2) 3224 3569

**Singapore Office**

3 Fusionopolis Place  
03-54 Galaxis Worklofts  
Singapore  
138523

T: +65 6822 2203