

Responsible Investing

Philosophy

Alexander Forbes Investments views responsible investing as an investment practice that integrates factors that may materially affect the sustainable performance of assets, including those of an environmental, social and governance (ESG) nature.

The company recognises the onerous responsibility placed on it by clients to not only achieve the best possible returns at acceptable levels of risk, but also to act in the best interests of the community and environment within which it operates.

Alexander Forbes Investments is particularly well positioned to collaborate with players in the SA asset management industry and actively engage asset managers on issues relating to responsible investing. The company believes asset managers that incorporate ESG factors into their decision making processes are better positioned to make quality investment decisions and more likely to improve the risk characteristics of their portfolios.

Alexander Forbes Investments believes in achieving responsible and sustainable benchmark beating returns (responsible alpha) by ensuring that the company, and the asset managers it selects, consider and evaluate the risks and opportunities arising from the consideration and incorporation of ESG factors.

Alexander Forbes Investments' embraces the principles of active engagement, both in terms of its own engagement with underlying asset managers, as well as the asset managers engagement with the underlying corporate and/or institutions, that they invest into. The objective is to encourage asset managers, both local and global, to consider and incorporate appropriate responsible investing practices into their investment decision making process, and to provide evidence that these practices are being applied.

Alexander Forbes Investments is a signatory to the United Nations Principles for Responsible Investment and endorses the Code for Responsible Investing in South Africa (CRISA).

Disclaimer

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