

ESG INVESTING

MORE THAN JUST DOING WELL BY DOING GOOD

The past decade has seen environmental and social governance investing develop from a niche corner of the market to an asset class revered for “doing well by doing good”. However, while there is an increased awareness among individuals as to the impact of their actions on the environment there is much more to ESG investing than *just* “giving back”. On a weekly basis, large and boutique asset managers alike are announcing ESG-focused product launches, citing the strategies as a key driver of alpha as well as the greater good the finances invested in the funds can do. However, the shift towards ESG is moving from purely cultural to infrastructural. In March this year the European Commission launched its Sustainable Finance Action Plan, a strategy to implement a financial system to support the EU’s climate and sustainable development agenda of cutting greenhouse gas emissions. Here in the UK, the government’s Green Finance Taskforce is seeking to introduce measures to move the economy to one based on low-carbon energy by creating an industry-wide green finance agenda.

With demand on the increase there is clearly a need for fund providers to ensure not only a strong suite of products in this space, but that the approach to supporting and communicating with both advisers and investors is fit for purpose. As such, our study explores:

- ⇒ Investor demand – and whether this is adviser or investor led;
- ⇒ How ESG funds are being used within the wider client portfolio;
- ⇒ How advisers research and make decisions with regards to how and where to invest client money;
- ⇒ Which providers advisers most associate with ESG funds and with whom they are placing business;
- ⇒ What advisers are looking for from providers – both in terms of proposition and support;
- ⇒ The challenges advisers and consumers face when investing in ESG funds – and how these can be overcome.

We will point clearly to how you can tailor propositions, services, support and communications to help secure business.

DELIVERABLES



100 DEPTH
INTERVIEWS
WITH TARGET
ADVISERS



ONLINE
CONSUMER
SURVEY



FULL
REPORT



FACE-TO-FACE
DEBRIEF



USE OF DATA
FOR COMMS /
PR SUPPORT



CICERO
HOSTED
EVENT



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