



UK  
Social  
Investment  
Forum

*Working with others to promote  
socially responsible investment*

## **UKSIF publishes New Report on SRI Institutional Investment Opportunities beyond Equities**

**30 June 2006**

The UK Social Investment Forum (UKSIF) [1] has today published a report to encourage investors, asset managers and investment consultants to consider socially responsible investment (SRI) options for asset classes beyond traditional equities.

'Discovering New SRI Institutional Investment Opportunities' [2] covers a wide range of asset classes including bonds, less conventional debt instruments, exchange traded funds (ETFs) and hedge funds. It also discusses carbon trading, microfinance and renewable energy. It provides examples of where products are already available and considers how further SRI investment options might be developed.

The report was researched and written by Anne-Marie Smith [3], an independent consultant with over 12 years of experience in investment research and analysis.

Penny Shepherd, Chief Executive of UKSIF, said: 'UKSIF has been keen for some time to help stimulate debate about the development of SRI products across a wider range of asset classes. We were therefore pleased to commission this report. We believe it will be an important and timely contribution to the debate on the future development of SRI and a useful study to assist those exploring this important area.'

The report is available at [www.uksif.org](http://www.uksif.org).

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### **Notes to Editor**

1. The **UK Social Investment Forum (UKSIF)** is the UK's membership network for socially responsible investment (SRI). UKSIF's primary purpose is to promote and encourage the development and positive impact of SRI amongst UK based investors. UKSIF believes that all material social, environmental and ethical (SEE) issues should be integrated into standard investment practice and that individual investors should be able to reflect their values in their investments.

The Forum was launched in 1991 to bring together the different strands of SRI nationally and to act as a focus and a voice for the industry. UKSIF's 200+ members and affiliates include retail and

institutional fund managers, financial advisers, SRI research providers, consultants, trade unions, banks, building societies, community development finance institutions, NGOs and individuals interested in SRI.

For more information on the UK Social Investment Forum visit [www.uksif.org](http://www.uksif.org).

## 2. About the report

The research on which this report is based was commissioned by UKSIF in 2005 and carried out between September and November 2005. The examples drawn upon serve to illustrate only and the inclusion of a particular investment or investment fund does not constitute a recommendation.

The conclusions of this report are the author's. They do not necessarily reflect the views of UKSIF or of its membership.

## 3. Anne-Marie Smith

Anne-Marie Smith has over 12 years' experience working in investment research and analysis including for Jeffries International, SocGen-Crosby Securities, HSBC and Morgan Stanley. Since April 2006, she has worked for Dawnay, Day Lockhart (DDL). She produced this report while working as an independent consultant in late 2005 and early 2006.

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