



News release
2019

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KBI GLOBAL INVESTORS FOCUS ON TRANSPARENCY RECOGNISED AT TAAM AWARDS

Institutional asset manager KBI Global Investors ('KBIGI') was delighted to have been invited to The Embassy of The Republic of Ireland in Paris last evening for the Transparent Aligned Asset Manager Awards and to have been conferred as 'Commended'. Known formerly as the RI Reporting Awards for Asset Managers and established as a collaboration between Responsible Investor and ReFine Research, the TAAM Awards are now run independently by ReFine Research and the Investment Innovation Benchmark (www.iib.io). Dublin-based KBIGI is one of just 15 managers in the world to make the final shortlist and one of just seven firms to be granted 'Commended' status.

The Awards, which have a two-step methodology, seek to measure asset managers' alignment with asset owner values and focus on fund managers deemed to be transparent in their approach to proxy voting. Asset managers are initially shortlisted based on their value alignment to a group of 40 highly respected asset owners¹ – the research team computing the correlation of each asset manager's voting results in the most recent proxy season with the average of the asset owner group. In the second stage, a group of asset owner and academic judges votes on the most transparent sustainability report of the shortlisted asset managers. To be conferred as 'Commended', managers' voting records must have correlated most (i.e. >85%) with the reference group of highly ESG-aware asset owners and have published Sustainability, Integrated or Annual Reports on ESG issues for 2018 in English.

Commenting on the award, Eoin Fahy, Head of Responsible Investing at KBI Global Investors said, *"We boast a long-standing commitment to Responsible Investing, dating back to the early 1980s. Transparency has been a key focus for us as we believe that our clients, and indeed the public, should have the right to see how we exercise the responsibilities that we have as part owners of companies. For example, we publish on our website how we voted in the annual meetings of every company in which we invest, and (importantly) our reasons for voting in the way we did. We also publish an annual report on our Responsible Investing activities, which gives detailed data on our voting and engagement activity, as well as an update on more general Responsible Investing trends. What is more, our Water, Energy Solutions and Agribusiness funds have each been approved as compliant with the European SRI Transparency Code (<http://www.eurosif.org/transparency-code>).*

"The TAAM Award underlines the strength of our proposition and credentials in this key area and sends a very clear message to the market and to our clients – that our commitment is real, deeply entrenched in the firm's investing culture and part of our very DNA."

– ENDS –

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¹ The asset owner reference group included Alberta IMC, Alecta, AP1, AP2, AP3, AP4, AP7, APG, ASR, Australian Super, BPL, BC IMC, BPP, CDC, CalPERS, CalSTRS, Cbus, First State Super, KLP, Local Government Super, LACERA, Maryland SRPS, Mercy IS, NYC Pension Funds, Northern Ireland LGOSC, OPTrust, OTPP, P+ (DIP/JOEP), PKA, PME, SFERS, State of Connecticut RPTF, SPOV, New York State Common, UniSuper, United Church Funds, University of California IO, Vermont PIC, VicSuper, and West Yorkshire PF

NOTES TO EDITORS

About KBI Global Investors ('KBIGI')

Established in 1980, KBI Global Investors ('KBIGI') is a specialist institutional asset management boutique, offering a range of Global Equities and Natural Resources strategies. The firm manages assets for a broad range of clients – public and corporate pension schemes, sub-advisory investors, foundations and endowments, wealth managers, private banks and investment intermediaries included. KBIGI enjoys an increasingly global client base and today holds mandates in the UK, Europe, North America and Asia. Part of the Amundi Group, the firm is headquartered in Dublin, with additional offices in Boston, Massachusetts.

Originally focused exclusively on the Irish market, managing predominantly domestic balanced mandates, KBIGI continues to manage pension fund assets for some of Ireland's largest and best-known corporations; today the firm enjoys significant coverage across the global institutional consultant community, offering investment services on both a segregated and unitised basis.

KBIGI boasts a track record of delivering consistent and outstanding risk-adjusted investment performance over the longer term, its highly experienced investment team today managing over €10.9bn. (This is the combined AuM of KBI Global Investors Ltd and KBI Global Investors (North America) Ltd as at 31st March 2019).

The firm is headed by CEO Sean Hawkshaw, with members of the KBIGI team holding 12.5% of the equity in the firm.

www.kbiglobalinvestors.com

Disclaimers

This award was made to KBI Global Investors on an independent basis with no involvement or prior knowledge of the award by KBIGI. No compensation was paid to the award provider by KBIGI for consideration or selection. KBIGI is not privy to the selection process and therefore cannot verify the basis on which awards are granted; however, the award provider can be consulted for further information. Past performance or the receipt of an award does not indicate any level of skill or future performance.

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