



PRESS RELEASE

A PRACTICAL GUIDE TO SRI TO RAISE THE AWARENESS OF ENTREPRENEURIAL ASSET MANAGEMENT COMPANIES REGARDING INSTITUTIONAL INVESTORS' EXPECTATIONS

Paris, 12 January 2021 - Emergence, the Paris financial centre fund dedicated to accelerating entrepreneurial asset management companies, is publishing a practical guide to socially responsible investment (SRI): *Practical SRI Handbook for emerging asset management companies*.

This guide came about as a result of two observations:

- French and international institutional investors must follow an accelerating number of restrictive recommendations issued by regulators or advocated by international initiatives, such as the UN PRI, or by civil society and policies – particularly as part of the stimulus plan – in order to integrate SRI into their investment strategies.
- At the same time, young asset management entrepreneurs are not always aware of the scale SRI has reached in institutional investors' allocation strategies, which the former often see as a niche segment that is more costly to invest in.

The purpose of this guide is to explain the reasons for and benefits of a real SRI approach by:

- raising the awareness of asset management companies about the SRI requirements that institutional investors must meet;
- offering a method to help entrepreneurial asset management companies implement an SRI policy in their own governance and investment process;
- encouraging entrepreneurial asset management companies – which are often agile and innovative – to realise that SRI also means investment strategies that can distinguish them from competitors.
- It is worth noting that rolling out an SRI approach when an asset management company is created costs less than converting a previously established range of management products.

Written in English by a panel of institutional investors, the guide is intended for various asset management company profiles, including:

- recent companies or those already active in SRI looking to do more to stand out;
- all strategies and asset classes;
- both French and international companies.

Specifically, the guide:

- is an independent initiative led by Emergence investors, who are among the most demanding and committed to SRI, in an environment where France is at the forefront of responsible finance;
- offers a condensed, resolutely practical and pragmatic view.



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“This SRI Guide fulfils one of the missions of Emergence, which, in addition to providing seed money for entrepreneurial asset management companies to manage, is also to support them in their development. It explains the minimum expectations of institutional investors in terms of SRI—a complex and ever-changing field, but one which also represents a broad range of opportunities for entrepreneurial asset management companies. Furthermore, as part of the launch of our new sub-fund – Emergence Europe – at the beginning of 2021, the Guide is a useful tool for future accelerated asset management companies to adopt best practices in SRI,” said **Laurent Deborde, Chairman of Emergence.**

The SRI Guide: *Practical SRI Handbook for emerging asset management companies* is available on the Emergence website at:

<https://www.emergence-incubation.com/NOUS-CONNA%8C3%8ETRE.html?anchor=ISR&lng=en>

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ABOUT EMERGENCE

Emergence is the Paris financial centre’s leading acceleration fund. Its goal is to accelerate the most promising and innovative young entrepreneurial management companies based in France or setting up in the country and to entrust them with capital to manage (seed money) which is a requirement for their growth and international development. Emergence invests for a period of at least four years in one of their funds selected to help it exceed €100 million in assets under management and to remove institutional and regulatory constraints (investment ratios).

Since its creation in early 2012, €800 million have been mobilised by the Emergence mutual fund and made available to 17 management companies to accelerate 19 funds via its three sub-funds whose delegated manager is NewAlpha Asset Management: Performance Absolue (€260 million), Actions I (€200 million) and Actions II (€320 million).

Emergence now brings together 15 major institutional investors who work together as real acceleration partners for these high-potential entrepreneurial asset management companies. (EDF, Caisse des Dépôts, Aviva, Cardif, Macif, CNP Assurances, UMR, Neufilize Vie, Groupe des Assurances du Crédit Mutuel, Maif, AG2R La Mondiale, Malakoff Mederic-Humanis, Prepar-Vie Assurance, Orano and Matmut).

By launching Emergence, the French asset management industry – the leader in Europe in terms of AUM (€4.185 trillion at end-2019) and recognised for its expertise, its capacity for innovation and its entrepreneurial momentum – has equipped itself with an innovative model that associates institutional investors with a fund that will increase the appeal of the Paris financial centre among European competitors as a hub for asset management activities.