29th April 2013

ESG Integration Working Group

CALL FOR INTEGRATED RESEARCH ANALYSIS

The ESG Integration Working Group recently published a leading review of integrated fundamental analysis. Interviews and research submissions from brokers and investment managers over a 12-month period resulted in the publication of 21 case studies that demonstrated the use of ESG information in equity valuation processes:

Integrated Analysis: How investors are addressing ESG in fundamental equity valuation.

In the wake of this publication and in response to demand from both the research and investor community the working group is now making a call for new submissions of integrated research. A selection of leading industry case studies will be published as a six-month update to the review. The first of these industry updates will be published in July this year.

Research submitted to this Q1/Q2 update will also be considered for presentation at **PRI in Person** in Cape Town this October. This will give a high-profile opportunity to present and discuss your integrated equity analysis and to answer questions from asset owners. There will be time for two presentations during the panel.*

Application requirements

Research needs to meet all of the following requirements:

- Global listed equity analysis (no market cap, geographic or sector restriction)
- Stock-level analysis
- Research must demonstrate the use of ESG information within an equity valuation model

Timeline

- Final research submissions **30th June**
- PRI ESG Working Group to decide which case studies to be published **mid July**
- Successful candidates to be asked to attend and present at Cape town **end July**
- PRI to publish integrated analysis industry update **end July**

Please send all submissions and any questions to jessica.cassey@unpri.org

* Please note that those invited to present their research will need to pay their own travel and accommodation costs