

ETHICAL INVESTMENTS



Currently over 70% of UK pension fund assets are in schemes committed to socially responsible investments (SRI). Almost 60% of occupational pension funds incorporate SRI into their investment strategies. Over the past ten years, there has been a 32% growth per annum in the value of ethical funds in the UK.

The following speakers will be illuminating the audience on some of the major issues which are encompassed in this fast growing field of portfolio investment:

Russell Sparkes
Fund Manager

Penny Shepherd
Executive Director

Emma Howard Boyd
Director

*Central Finance Board
of the Methodist Church*

Social Investment Forum

Jupiter Asset Management

If you require any further information on the evening, please contact Stephen Inkley on 02075977008 or e mail at stephen.inkley@daiwasbi.co.uk

Details

Date: Thursday 24th May 2001
Location: Chartered Insurance Institute
20 Aldermanbury
London EC2V 7HY

Nearest tube: Bank/St.Paul
Time: 17:45 for 18:00 prompt start
Fees: UKSIP members £15
Non-members £20

Light refreshments will be served

Attendance is limited to 60 . Registration is on a first come, first serve basis.

Please complete the registration form below and fax/email it, with your credit card number or your cheque, payable to the UK Society of Investment Professionals to: 21 Ironmonger Lane, EC2V 8EY
Tel: 020 7796 3000 Fax: 020 7796 3333 e-mail: uksipstaff@uksip.org

Name: _____ Title: _____ Firm: _____

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I am a: () UKSIP Member () Committee Member () Non-Member

Please bill my () Visa / MasterCard / EuroCard / Switch* () I enclose a cheque

Card Number: _____ Please note that UKSIP do not accept Amex or Diners.

Signature: _____ Expiry Date: _____

() Please tick this if you would like to receive UKSIP membership information

* Delete as appropriate

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Agenda

6.00-6.20pm	Russell Sparkes
6.20-6.40pm	Penny Shepherd
6.40-7.00pm	Emma Howard Boyd
7.00-7.30pm	Questions & Answers
7.30-8.00pm	Drinks/Refreshments

Russell Sparkes, a Fund Manager with the Central Finance Board of the Methodist Church will be chairing the event. In 1994 he joined the Central Finance Board of the Methodist Church (CFS). His primary responsibility is the day to day management of the CFB Overseas Fund. He is also Secretary to the Joint Advisory Committee on the Ethics of Investment. He is the author of *The Ethical Investor*, a handbook on practical ethical investing, published by Harper Collins in 1995. He served on the Board of the UK Social Investment Forum for a number of years.

Penny Shepherd has been Executive Director of the Social Investment Forum since 1997. She will cover the study undertaken by the UK Social Investment Forum of the response of UK Pension Funds to the new SRI Disclosure regulation. She will also look at the size of SRI in the UK.

Emma Howard Boyd is head of the research unit at Jupiter Asset Management and has been a researcher for SRI funds since 1994. She will compare how strategies vary between funds that are considered SRI. Jupiter Asset Management have a specialised socially responsible product called the Environmental Opportunities Fund.