



Rome Investment Forum 2019

In co-operation with **afme** /
Finance for Europe

9-10 December 2019, Scuderie di Palazzo Altieri, Rome

#RIF2019



Antonella Massari

With the Patronage
of the European Parliament



In cooperation with



Main Sponsors



Sponsor



Partners



ESG and Private Banking

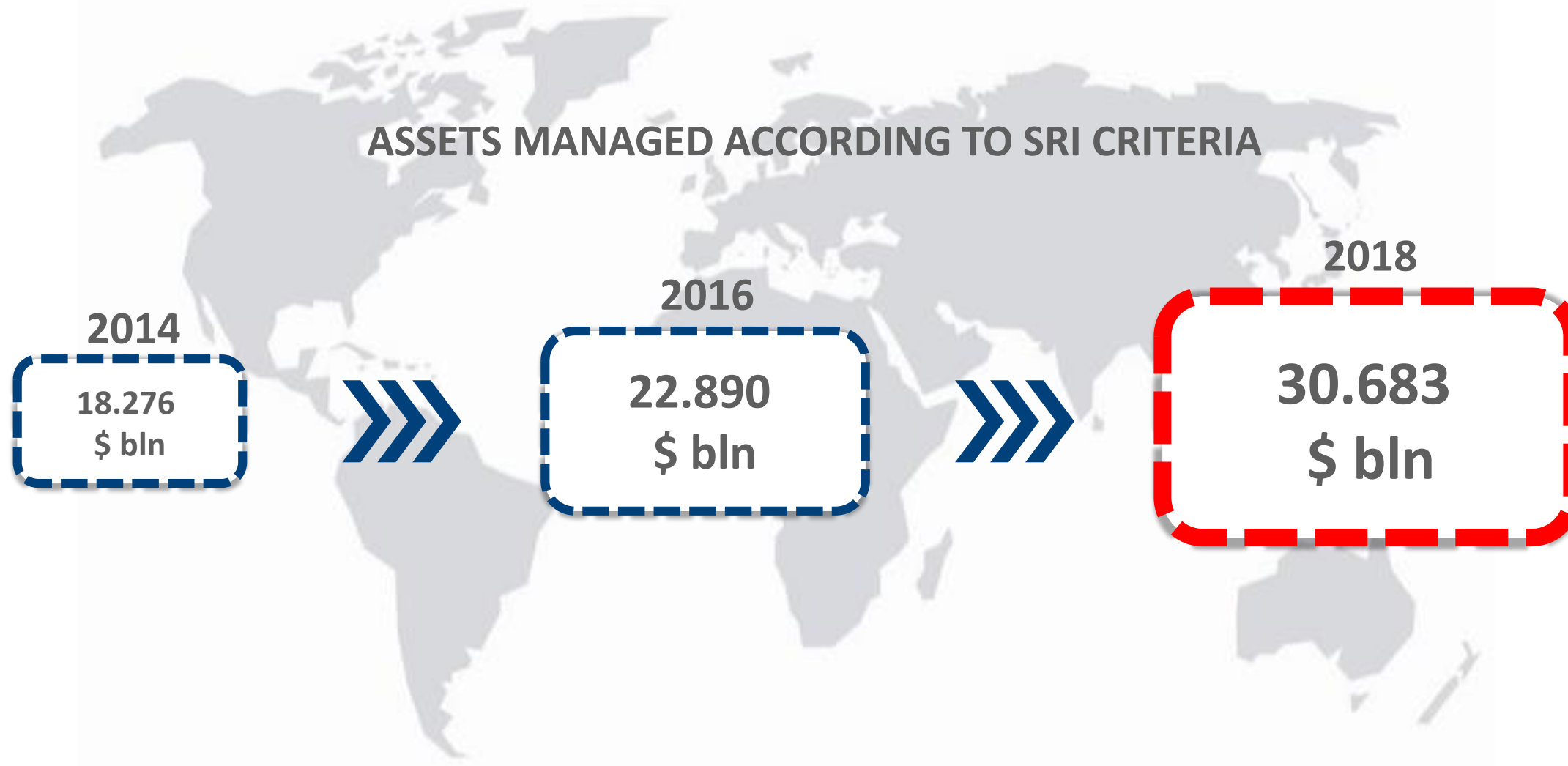
FeBAF – Rome Investment Forum 2019

Antonella Massari, *Segretario Generale AIPB*

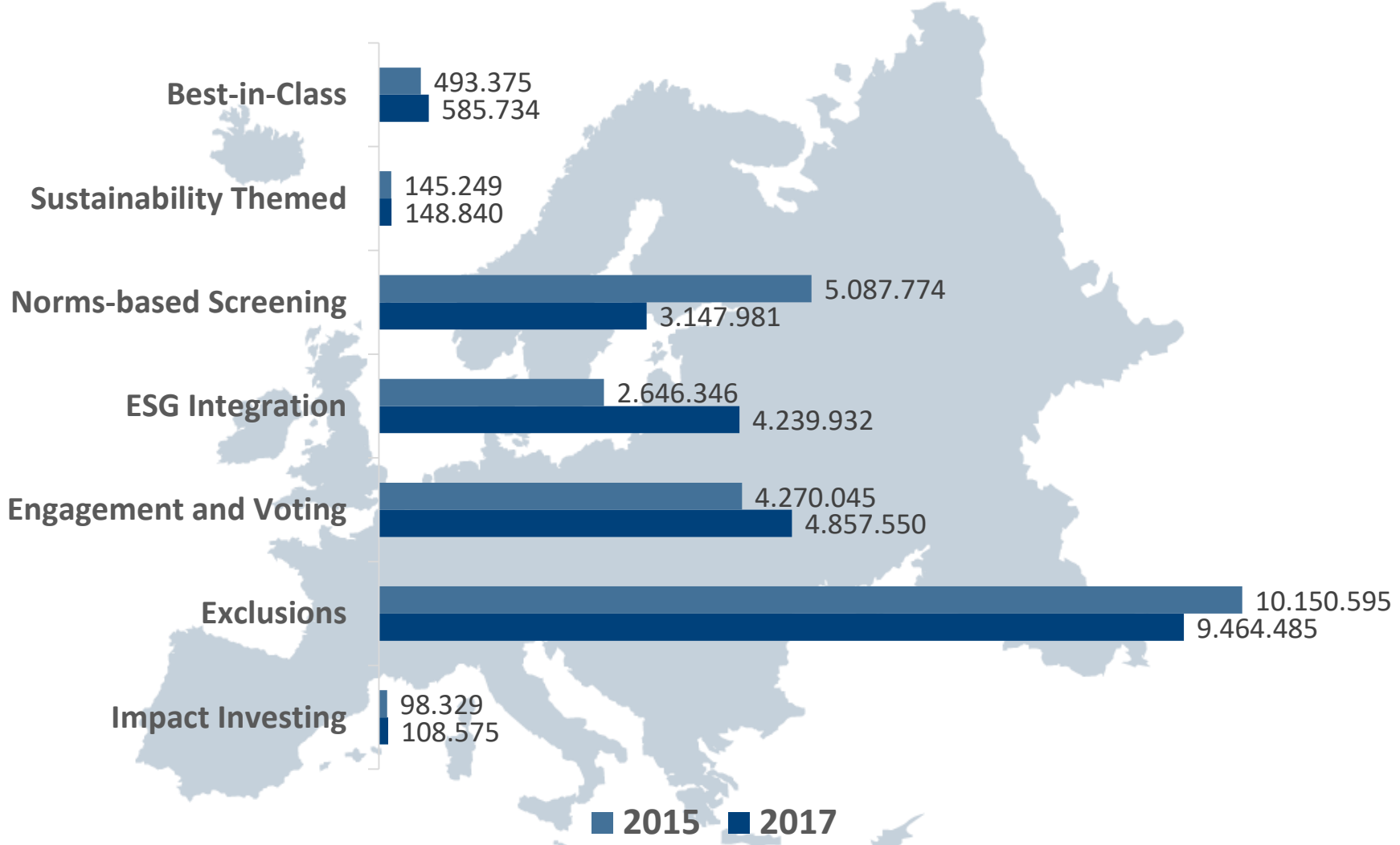
9-10 dicembre 2019



Global growth of Sustainable and Responsible finance has recently accelerated




More sophisticated strategies are growing weight in Europe ESG integration and Engagement

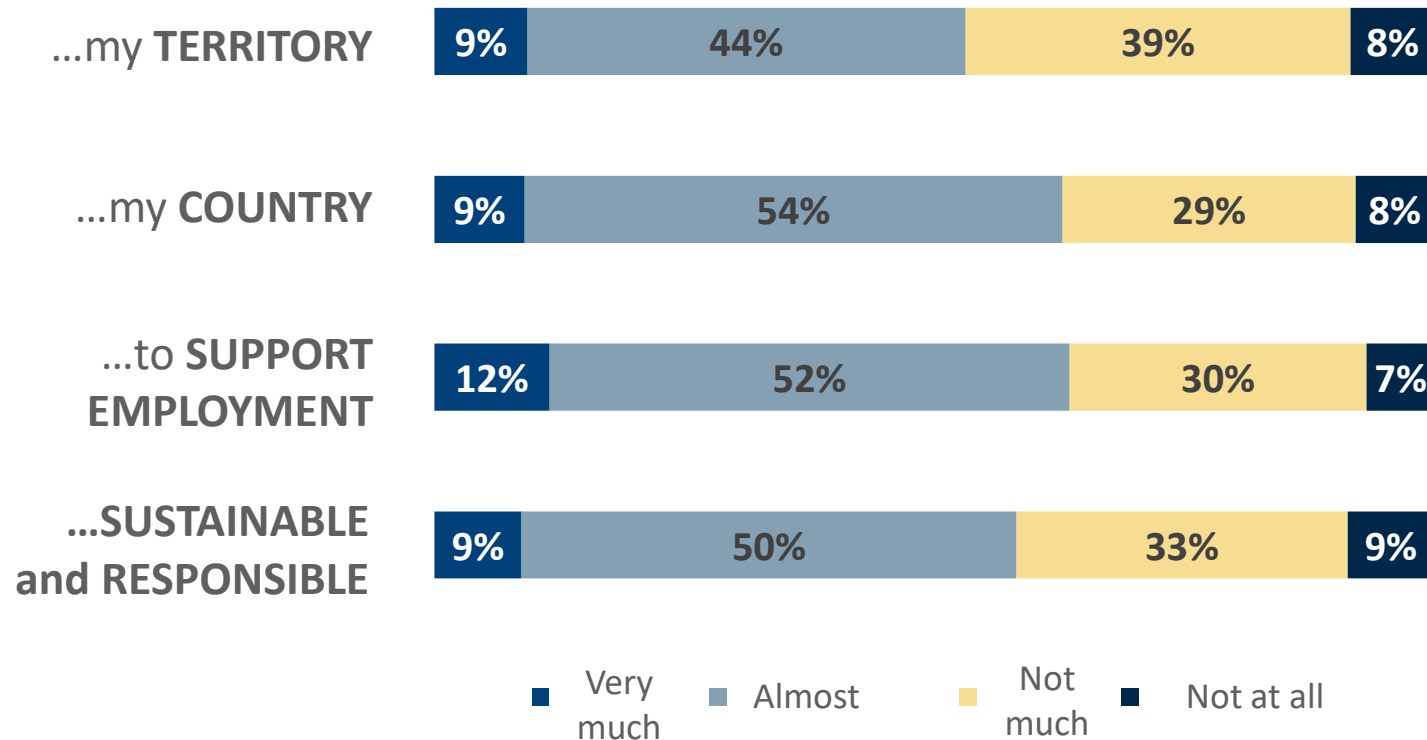


Source: Eurosif 2018 – €

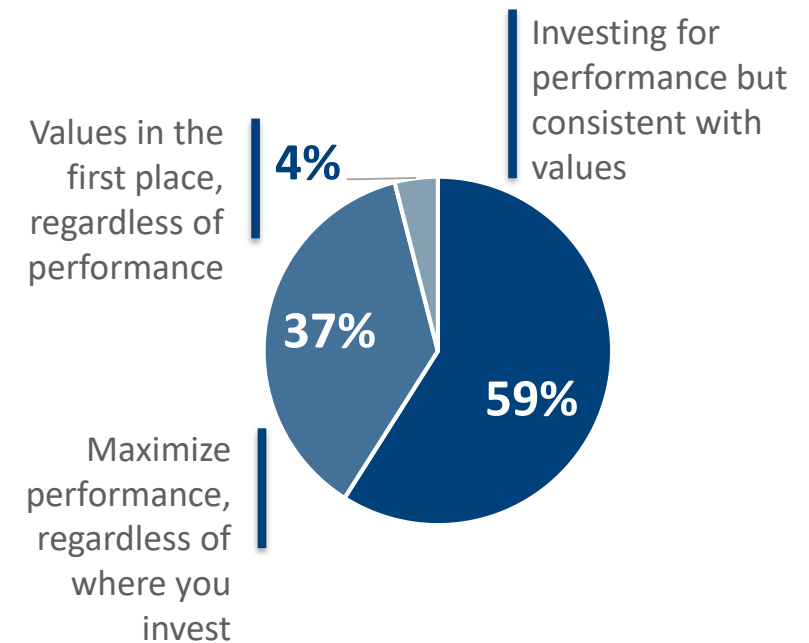
Majority of Private Customers considers values in financial investment decision

 Question to Private Customer → «Regarding how to invest your wealth, how important are the following aspects?»

My investments generate value for/my investments are...



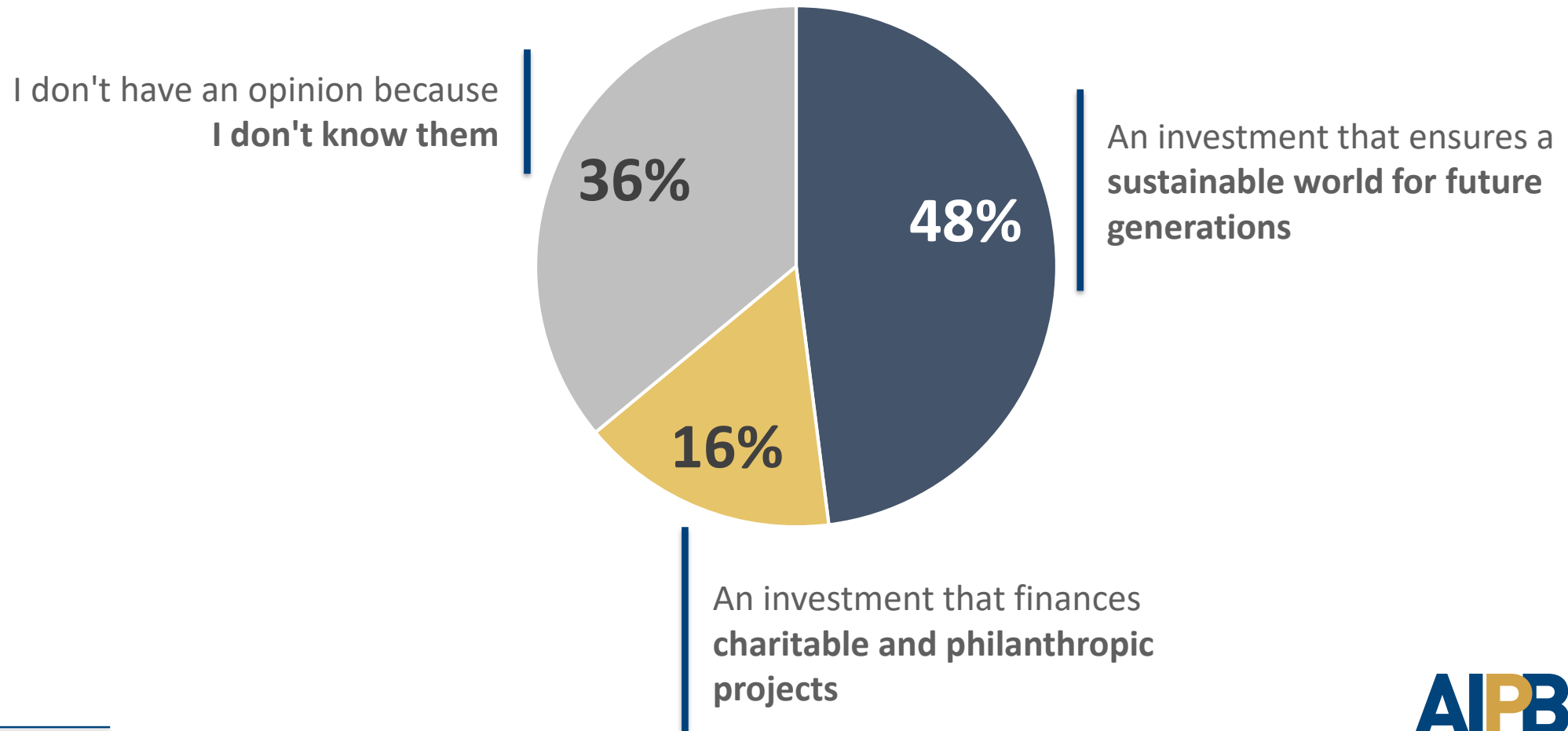
Investment DRIVER



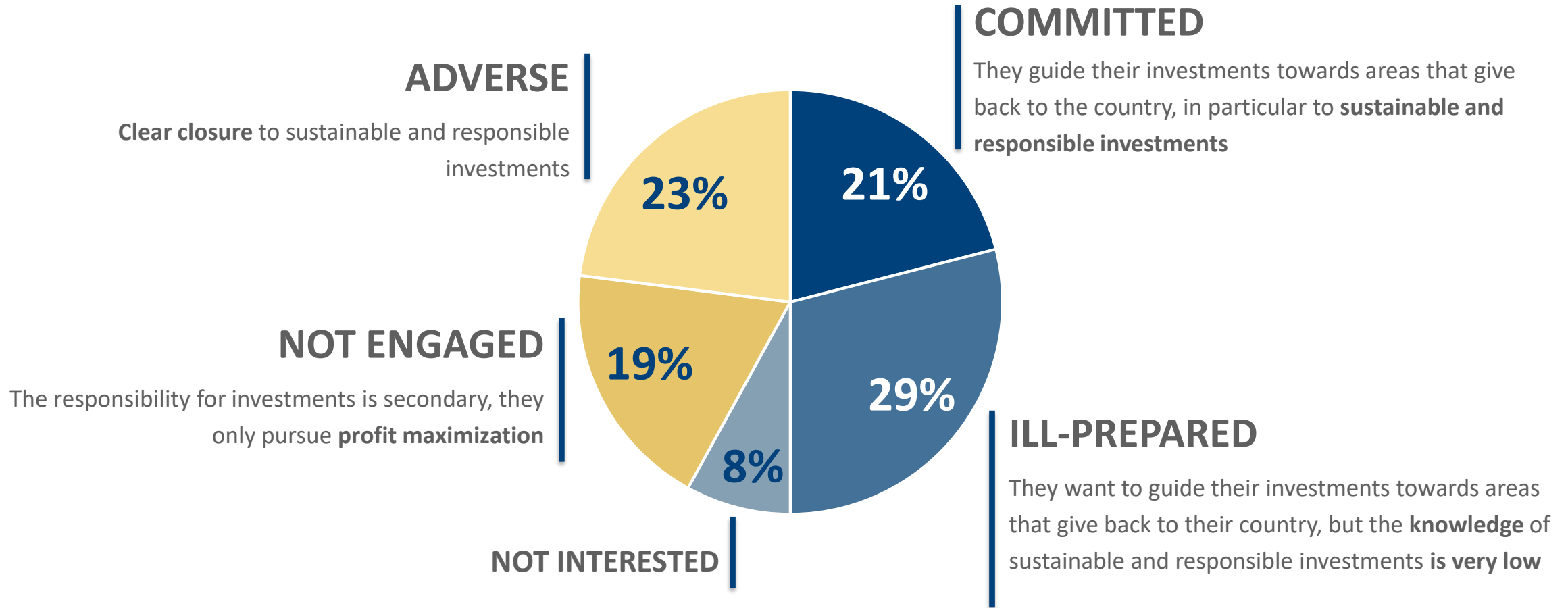
Definition of SRI is still uncertain



Question to Private Customer → «We talk a lot about Sustainable and Responsible Investment (SRI). What do you think it is?»



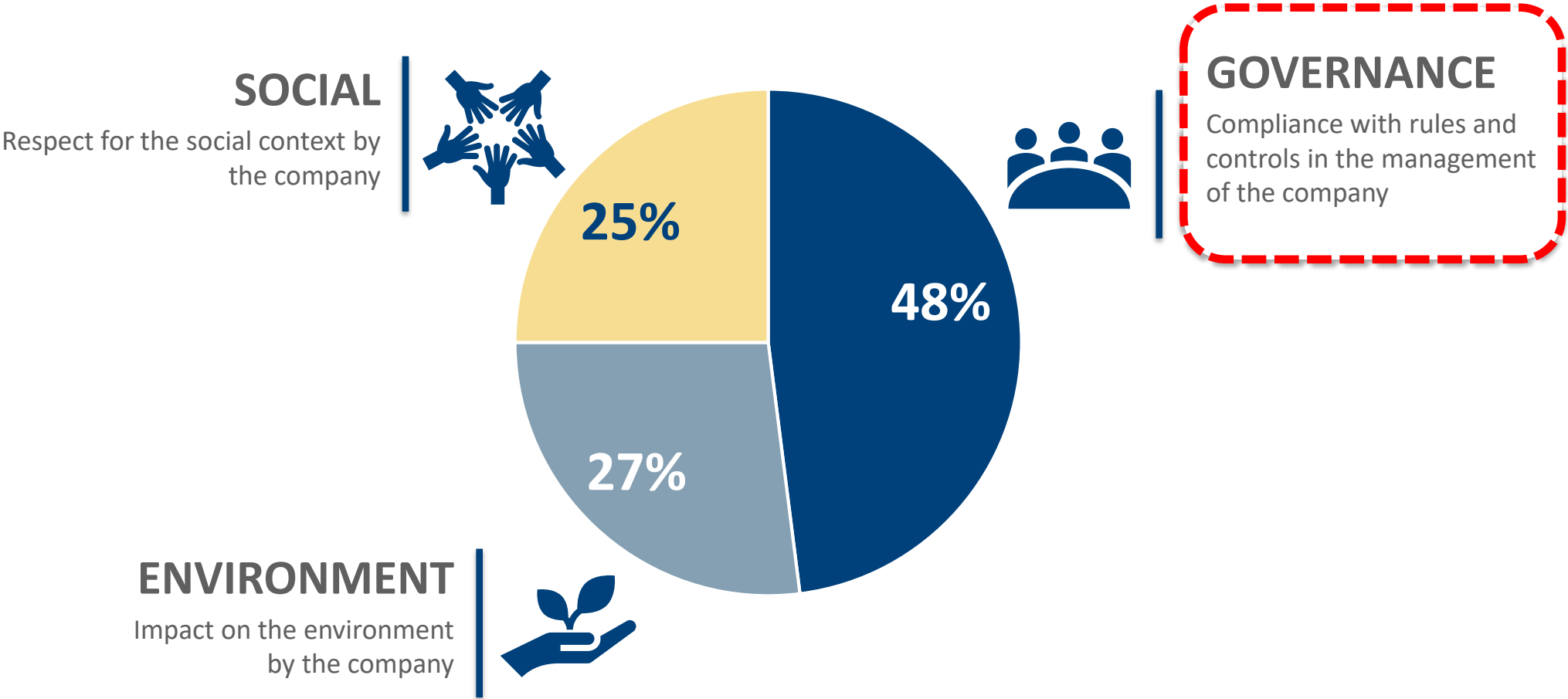
In-depth Customer scrutiny reveals 5 types of ESG Private Investors



Hierarchy of criteria to define SRI: Private Customers put Governance first

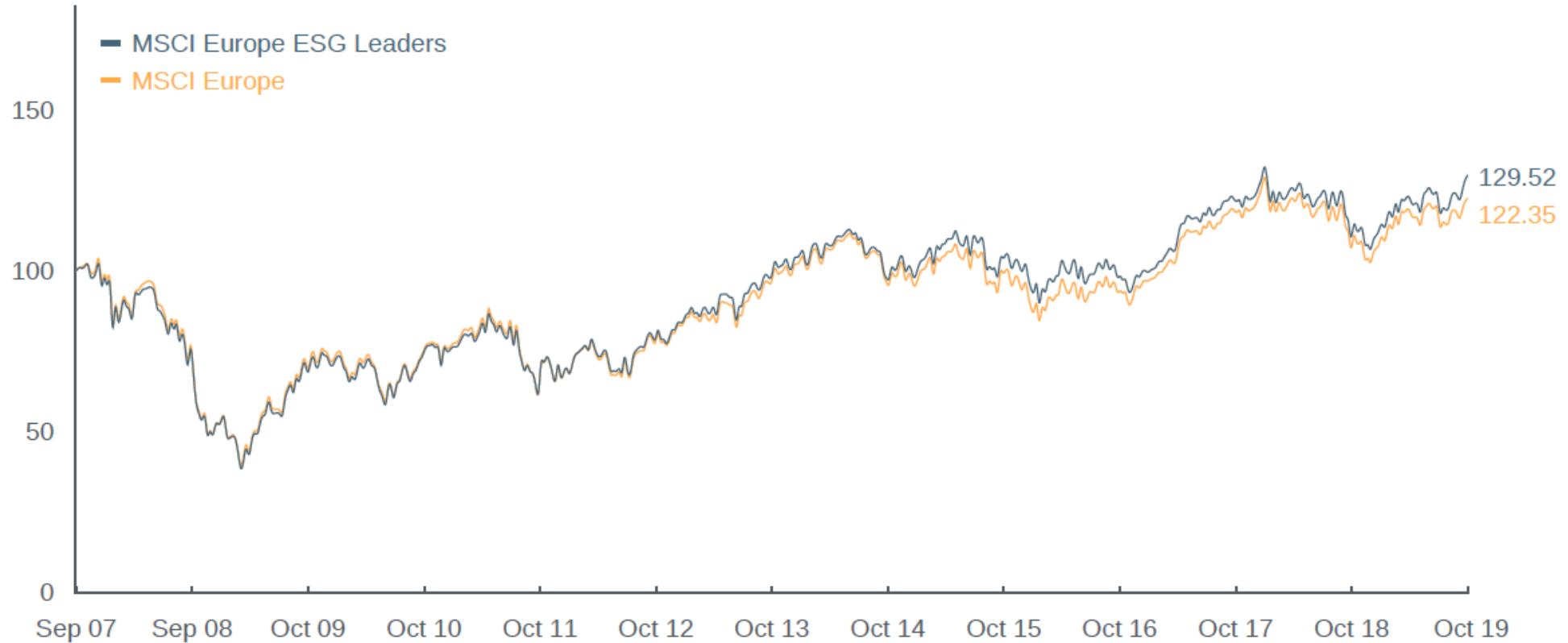


Question to Private Customer → «Thinking about ESG, which criteria do you consider first?»



SRI and PERFORMANCE can go together

CUMULATIVE INDEX PERFORMANCE - GROSS RETURNS (USD) (SEP 2007 – OCT 2019)



MSCI EUROPE ESG LEADERS INDEX (USD)

Private Banker/Financial Advisor could be SRI main influencer

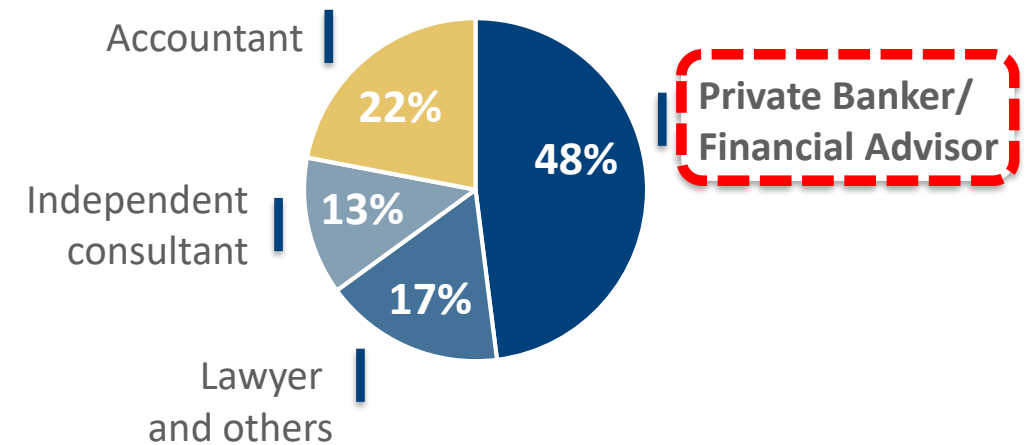
To avoid “BEING IN THE WRONG PLACE” in the world of sustainable and responsible investments...



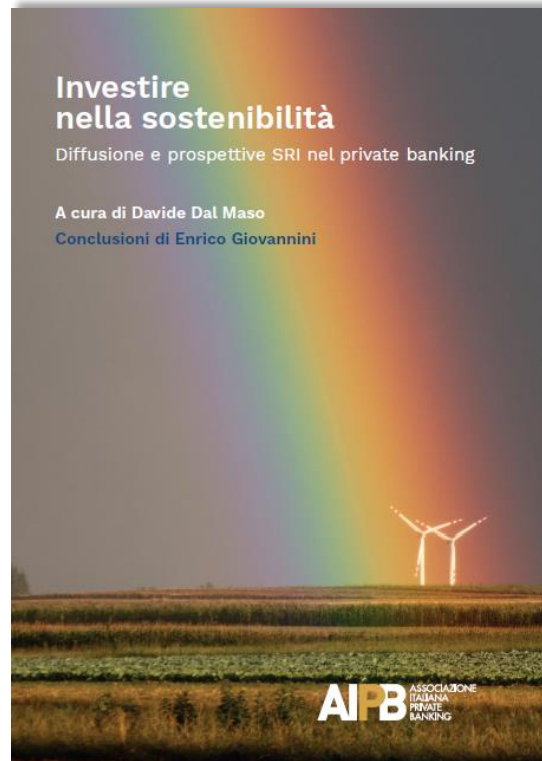
...Private Bankers and Financial Advisors can address Private Customers towards investment choices which consider their values.



Question to Private Customer:
«Which professional would you rely on for SRI?»



AIPB contributions for a better understanding of Sustainable and Responsible Investment



Through a **book**

&

a professional **ESG Certification**



AIPB ASSOCIAZIONE
ITALIANA
PRIVATE
BANKING