



PPCmetrics AG  
Investment & Actuarial Consulting,  
Controlling and Research. [www.ppcmetrics.ch](http://www.ppcmetrics.ch)



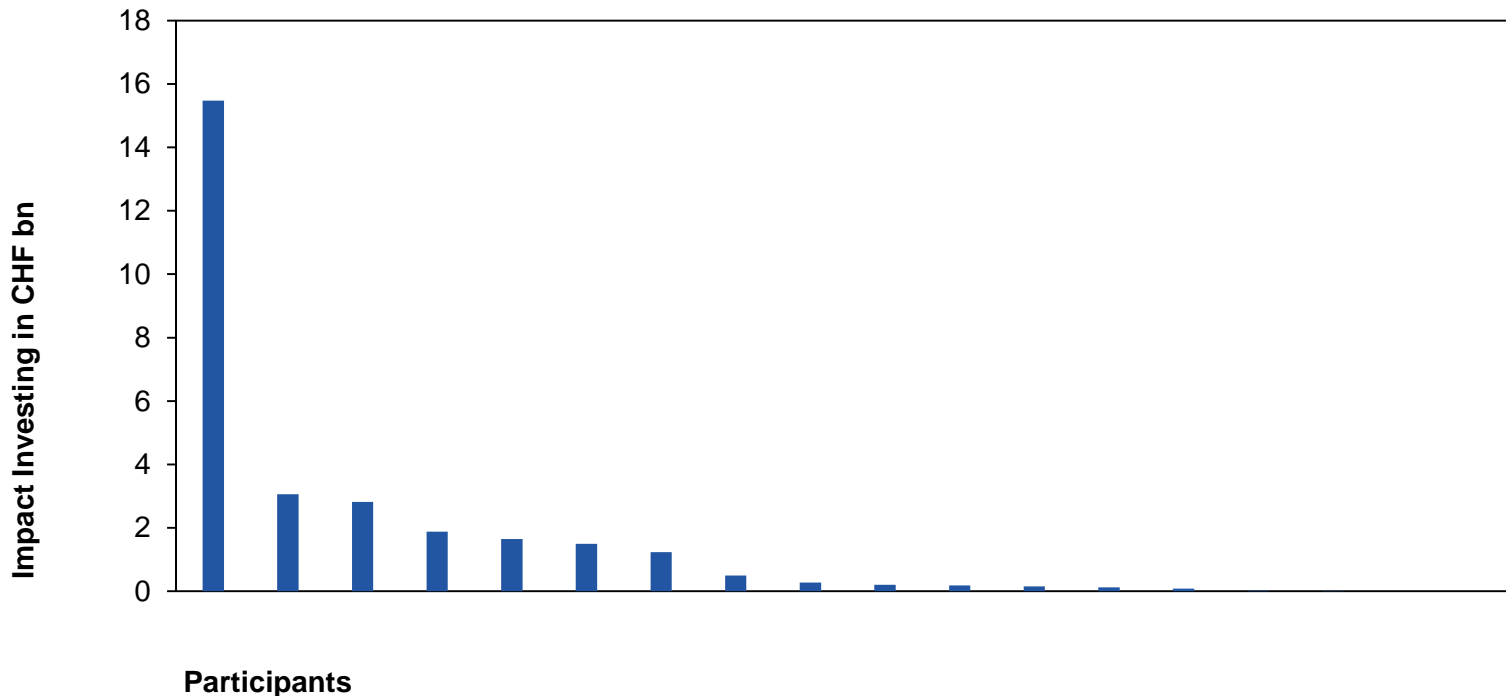
## Market Screen

### Impact Investing

Number of Participants	18
Assets under Management in this Asset Class	CHF 35.2 bn
Assets under Management for Swiss Pension Funds	N/A

# Market Screen Impact Investing

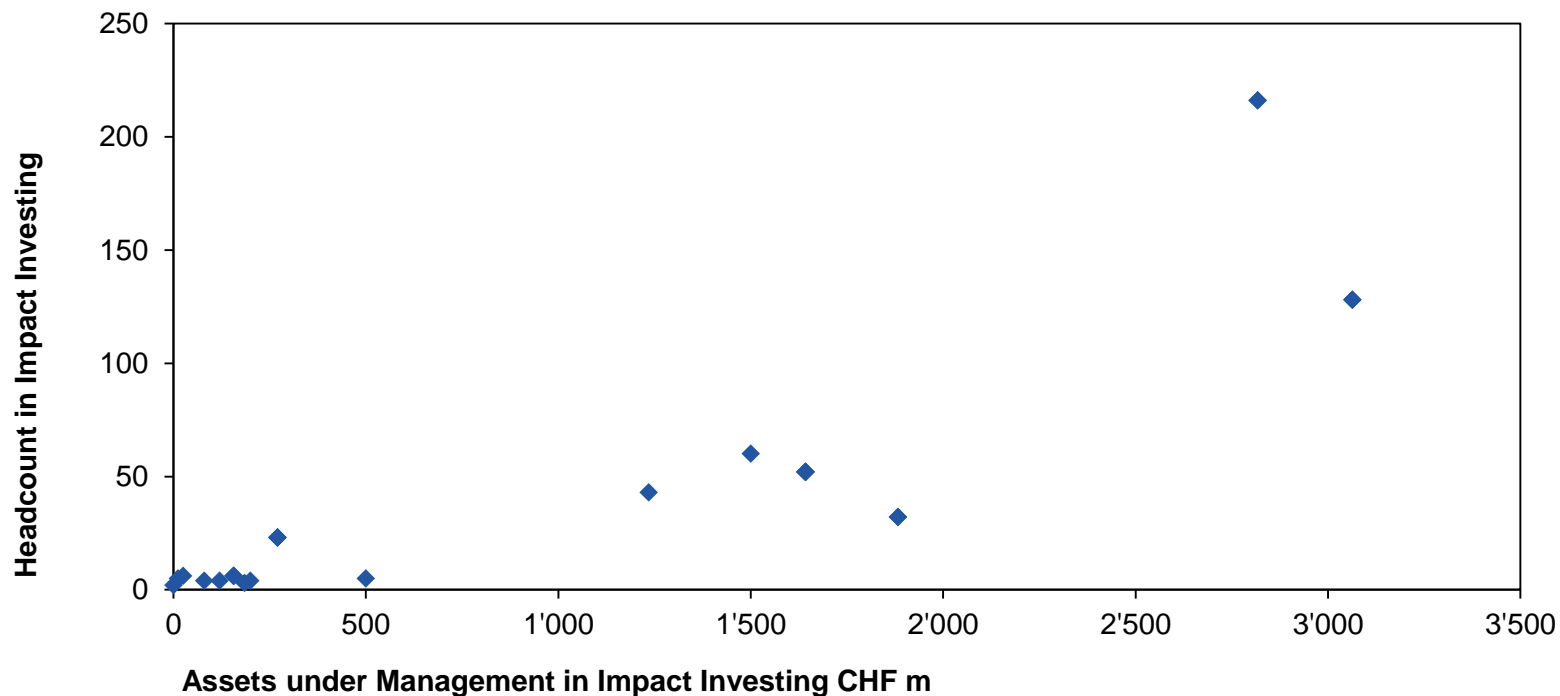
## Assets under Management



The asset managers participating in the PPCmetrics Market Screen manage CHF 35.2 billion according to Impact Investing approaches. The average (median) assets under management are roughly CHF 240 million. Two participants do offer impact investing but they do not manage any assets yet. 11 out of 18 are completely specialised in Impact Investing and manage 100% of their assets according to Impact Investing approaches.

# Market Screen Impact Investing

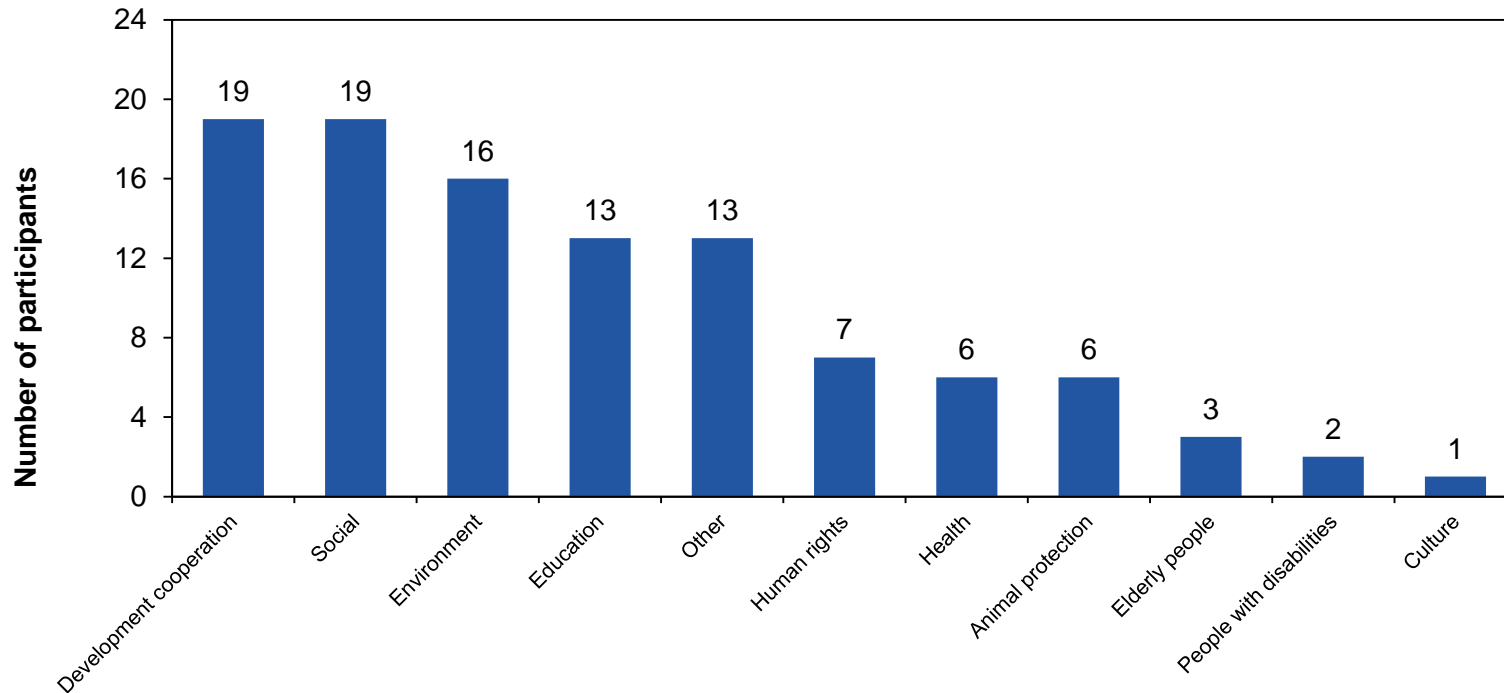
## Headcount in comparison with Assets under Management in Impact Investing



On average (median), each asset manager employs 23 persons in the area of Impact Investing. The graph shows that asset managers with more assets under management have more personnel resources. The largest asset manager in Impact Investing is not displayed in the graph for presentational purposes (AuM CHF 15.5 bn; Headcount: 26).

# Market Screen Impact Investing

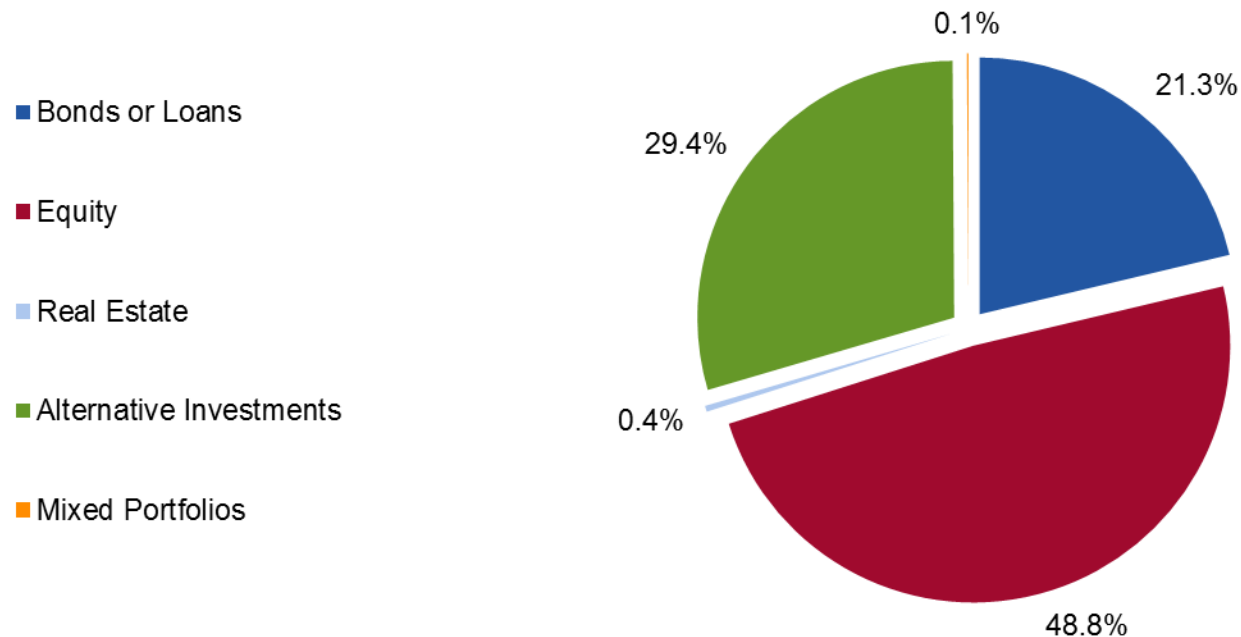
## Suitability of the Investment Approach for a certain Purpose of a Foundation



The graph shows for which purposes of a foundation the offered products are suitable. The most products are suitable for charitable foundations which promote development cooperation or have social goals, followed by objectives regarding the environment and education.

# Market Screen Impact Investing

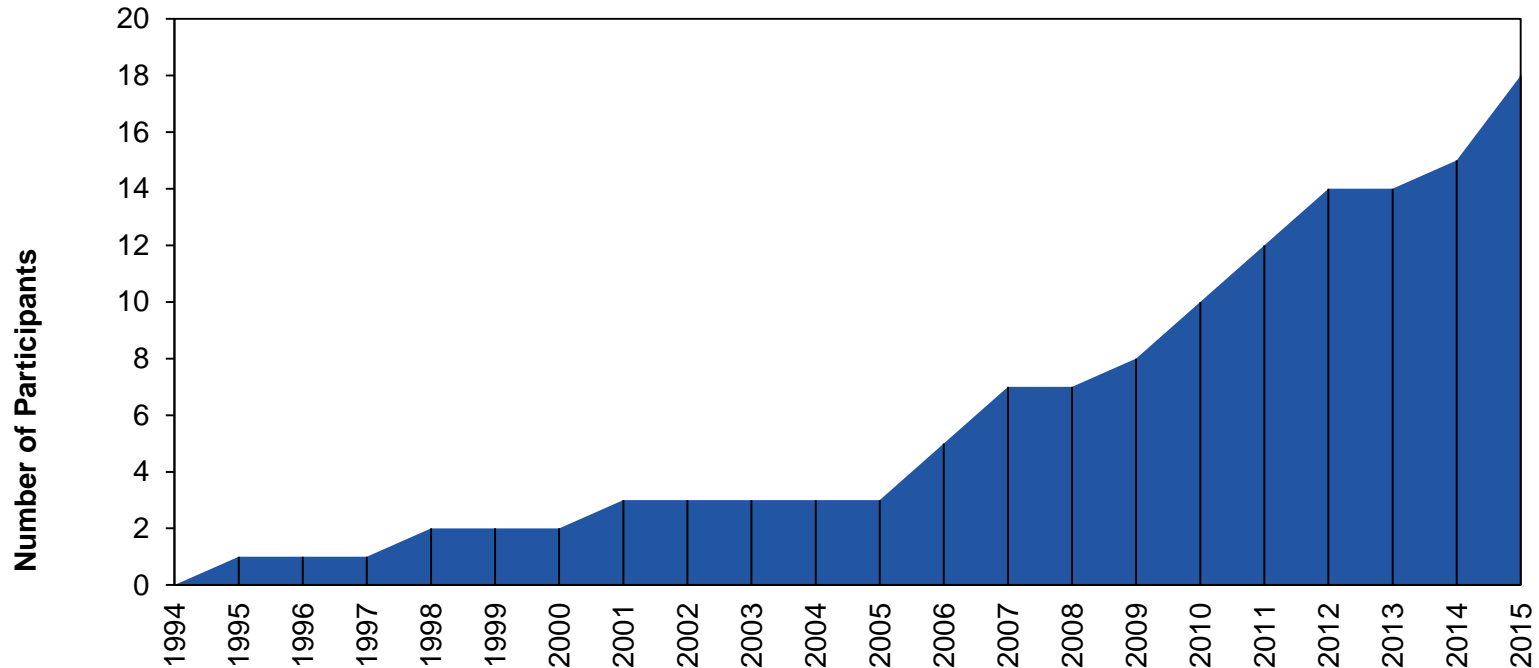
## Assets under Management in the respective Asset Class



The graph shows the assets managed by the participants broken down by asset class. By far the largest asset class for Impact Investing are equities (almost half of the assets under management). Alternative Investments and bonds/loans are of less importance compared to equities. In real estate and mixed portfolios almost no assets are managed according to Impact Investing approaches.

# Market Screen Impact Investing

## Number of Investment Approaches over Time



Especially in the last 10 years many new investment approaches for impact investing were launched. The first approach exists since 1995.

# PPCmetrics Market Screen

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Assets under Management

Organization and Human Resources

Product Team

Investment Approach and Portfolio

Track Record

Fees

To obtain and evaluate current information from asset managers we regularly conduct market screens. Any investment manager may participate free of charge.

With the support of the PPCmetrics market screens the most suitable candidate can be efficiently identified in an open, well structured process.

Institutional and private investors, insurance companies and family offices use the PPCmetrics market screens to select the best asset manager.



# Contact

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Controlling and Research

## **PPCmetrics AG**

Badenerstrasse 6  
Postfach  
CH-8021 Zürich

Telefon +41 44 204 31 11  
Telefax +41 44 204 31 10  
E-Mail [ppcmetrics@ppcmetrics.ch](mailto:ppcmetrics@ppcmetrics.ch)

## **PPCmetrics SA**

23, route de St-Cergue  
CH-1260 Nyon

Telefon +41 22 704 03 11  
Telefax +41 22 704 03 10  
E-Mail [nyon@ppcmetrics.ch](mailto:nyon@ppcmetrics.ch)

Website [www.ppcmmetrics.ch](http://www.ppcmmetrics.ch)

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**mit Vergleichen**  
 Die Anwerbskräfte sind vielfach...  
 Durch welche in Frage...  
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 Die Anwerbskräfte sind vielfach...  
 Durch welche in Frage...

# Videos



# Publications



# Website

**Lang mehr Transparenz der Tragfähigkeit**  
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 ... sich viele Personengesellschaften an...  
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Our experts share their knowledge and opinions with the public.

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