

## SUSTAINABILITY 2021, MARCH 9-10

The COVID-19 global health and economic crisis has highlighted the need for leadership and capital to be urgently targeted towards the vulnerabilities in the global economy. The issues of sustainability have never been more important and it's a critical time for investors to be collaborating for better corporate behaviours and economic outcomes.

According to the IMF, more than \$20 trillion is needed over the next 20 years to be invested in climate change and other sustainable development goals. But countries cannot achieve this on their own. Governments need to make it easier for business to finance and invest in sustainable development projects, the private sector needs to mobilise for long-term investment, and new solutions for financing the SDGs must be created.

This conference is an urgent call to action for all investors to influence investee companies to change their focus and put people before profits to create a more sustainable economy, and to wake up to the crucial role they play in ensuring a sustainable recovery.

Through case studies of investment and corporate collaboration, investors will hear how their peers have been engaging for change on issues relating to the environment, labour practices and better long-term outcomes. The conference will address the social and economic consequences of the coronavirus and outline the role that investors can play in the path to a sustainable economy.

### AN INTERACTIVE PLATFORM

Attracting asset owner involvement from all over the globe, the event will be streamed live on [www.top1000funds.com](http://www.top1000funds.com) and held on a technology platform managed by a professional production company in a live studio and will be of broadcast quality. Interactivity will be available via live questions and polls and networking will still take place in the form of virtual table discussions. A platform hub will be created to house relevant thought pieces, [www.top1000funds.com](http://www.top1000funds.com) articles and podcasts. The live sessions will be recorded and available on demand after the event.

The program is being built on the back of the much-loved Fiduciary Investors Symposium series, which over the past 10 years has tackled issues that long-term investors face and how the long-term thematic in the global economy prompt investors' portfolio decisions today.

### DELEGATE PROFILE

The Sustainability global digital event is for the senior investment professionals at large institutional investors around the globe. It will be made available to chief investment officers of pension funds, endowments and sovereign wealth funds and their investment teams, as well as chairs and board trustees from all over the world.

### MEDIA PARTNER

[www.top1000funds.com](http://www.top1000funds.com) is the news and analysis site for the world's largest institutional investors. It focuses on strategy and implementation and is populated with original news stories, case studies and research that relate directly to the work of investment professionals at pension funds, endowments and sovereign wealth funds. One of its defining characteristics is truly global content that focuses on the strategies, portfolio construction and implementation techniques of institutional investors.

**NOTE, ALL TIMES ARE IN BST**

**TUESDAY, MARCH 9, 2021**

1.00 – 1.10 PM      WELCOME

- **Colin Tate**, chief executive, Conexus Financial (Australia)

1.10 – 1.35 PM

### THE SUSTAINABLE YEAR AHEAD

This session outlines the key priorities for investors in 2021 in terms of sustainable investing.

- **Gilbert van Hassel**, chief executive, Robeco (The Netherlands)
- **Chair: Amanda White**, director, institutional content, Conexus Financial (Australia)

1.35 – 2.10PM

### A UNITED FRONT

How sustainability policies under President Biden combined with the ongoing EU policies means 2021 marks a new frontier for the progression of sustainability. This session will look at what that means for investors.

- **Fiona Reynolds**, chief executive, PRI (United Kingdom)
- **Matt Patsky**, chief executive, Trillium (United States)
- **Sarah Bratton Hughes**, head of sustainability, North America, Schroders (United States)
- **Chair: Colin Tate**, chief executive, Conexus Financial (Australia)

2.10 – 2.35

### PROBABLE FUTURES

This session examines research from the Woodwell Climate Research Centre that assesses the socioeconomic risks associated with climate change and shows how societies and economies will cross critical thresholds and face new vulnerabilities over less time than the duration of a typical mortgage. It will highlight the role the private sector can play and the importance of integrating the insights of climate science into decision making the same way financial and cyber risks are.

- **Christopher Schwalm**, risk program director, senior scientist, Woodwell Climate Research Center (USA)
- **Chair: Colin Tate**, chief executive, Conexus Financial (Australia)

2.35 – 3.00

### CLIMATE... TALKS

This session looks at the expected sustainability policies in 2021 and the important role of a price on carbon as part of that. The winner of the Nobel Prize for his work on "integrating climate change into long-run macroeconomic analysis" outlines the best approach, as well as the idea of an international climate compact to bring countries and policies together.

- **William Nordhaus**, Sterling Professor of Economics and Professor of Forestry and Environmental Studies, Yale University USA)
- **Chair: Amanda White**, director, institutional content, Conexus Financial (Australia)

3.00 – 3.30

### THE PATH TO NET ZERO

This session looks at the actions of both asset owners and asset managers in reaching net-zero 2050 goals including the short-term plans needed to get there.

- **Victor Verberk**, CIO, Robeco (The Netherlands)
- **Deborah Ng**, head of responsible investment, OTPP (Canada)
- **Faith Ward**, head of responsible investment, Brunel Pension Partnership (United Kingdom)

- **Chair: Colin Tate**, chief executive, Conexus Financial (Australia)

3.30 – 3.55PM

#### BRIDGEWATER SESSION – WAITING APPROVAL

Macro research on inequality, wealth and income gap and how that is impacting policy as well as research on how focusing on SDGs is also a focus on climate, and how that can be a path to net zero

- **Karen Kaniol-Tambour**, head of investment research, Bridgewater Associates (USA)
- **Chair: Amanda White**, director, institutional content, Conexus Financial (Australia)

3.55 – 4.25PM

#### HOW CAN BOND INVESTORS IMPACT EMERGING MARKET DEVELOPMENT?

This session examines the development and evolution of sustainability bonds in emerging market debt, how they can be used for impact in developing and emerging economies and allow investors to be more targeted.

- **Mary-Therese Barton**, head of emerging market debt, Pictet
- **Farah Hussain**, senior financial officer, World Bank Treasury
- **Chair: Colin Tate**, chief executive, Conexus Financial (Australia)

4.25 – 4.55PM

#### DIVERSITY UNCUT

In a fireside chat, Gloria Steinem - often called the world's most famous feminist who has been advocating for women's rights for 55 years - will remind us why diversity is such an important issue for investors to understand, why it impacts society, business and investments so fundamentally, and why there is still so much work to do.

- **Gloria Steinem**, feminist
- **Chair: Amanda White**, director, institutional content, Conexus Financial (Australia)

5.00 – 5.30PM

#### INVESTOR-LED CHAT ROOMS

Investors will have the chance to join private chat rooms with speakers and their peers to discuss the themes of the conference including the fallout of the US election and what their outlook is for 2021. Using special networking technology this dedicated session will allow interactivity among delegates to discuss key themes. The "rooms" or "tables" will be hosted by leading investors from around the world.

### WEDNESDAY, MARCH 10, 2021

1.00 – 1.10 PM

#### WELCOME

- **Colin Tate**, chief executive, Conexus Financial (Australia)

1.10 – 1.15 PM

#### VIDEO TAKEOUTS FROM GLORIA STEINEM FIRESIDE CHAT

1.15 – 1.45 PM

#### DIVERSITY AND INCLUSION – GENDER LENS INVESTING

- **David Neal**, chief executive, IFM
- **Jason Lamin**, founder and chief executive, Lenox Park Solutions
- **Helena Morrissey**, chair, Diversity Project **Chair: Amanda White**, director, institutional content, Conexus Financial (Australia)

1.45 – 2.15 PM

### DIVERSITY AND INCLUSION CASE STUDIES

This session will look at various asset owner case studies and how they are tackling diversity and inclusion, through their own organisational processes and practices, through manager due diligence and by aligning their investments with the SDGs.

- Mansco Perry, chief investment officer, Minnesota State Board of Investment – manager due diligence - invited
- **Ulrika Danielson**, head of corporate governance, AP2 – aligning SDGs with gender equality
- Dana Grey, diversity and inclusion chair, director of legal, compliance and ethics, PPF – internal practices and processes - invited
- **Chair: Colin Tate**, chief executive, Conexus Financial (Australia)

2.15 – 2.45 PM

### HOW TO ASSESS HUMAN CAPITAL RISK

This session looks at how human capital is a key value generator for companies, and addresses the human capital risk inherent in companies and how they are addressing it, including implementing technology, re-skilling and training for the future, which groups of employees they are investing in and how this impacts engagement.

- George Serafeim, Charles M Williams Professor of Business Administration, Harvard Business School – invited
- John Ruggie, Berthold Beitz Professor in Human Rights and International Affairs, Harvard Kennedy School of Government (USA), - invited
- **Chair: Amanda White**, director, institutional content, Conexus Financial (Australia)

2.45 – 3.15PM

### ENGAGEMENT - LABOUR RIGHTS AND COVID

This session looks at how investors can influence investee companies to change their focus and put people before profits to create a more sustainable economy. It will look specifically at the actions of corporations during the COVID health crisis and the rights of workers.

- Amazon corporate ?? – Sharan to confirm
- **Sharan Burrow**, general secretary, International Trade Union Confederation (Belgium)
- **Mike Garland**, assistant comptroller, New York City Comptroller's office (USA)
- **Anna Pot**, head of responsible investment, Americas, APG (The Netherlands)
- **Chair: Colin Tate**, chief executive, Conexus Financial (Australia)

3.15 – 3.45

### WHAT'S NEXT FOR INVESTOR ACTION?

What are the next generation strategies and tools for investor engagement and what frontier topics should investors be considering. This session looks at two case studies activist stewardship (with Exxon) and whether investors are funding treason (the case of the US congress riots).

- Scott Kalb, director, Responsible Asset Allocator Initiative, New America - invited
- **Aiesha Mastagni**, investment officer, CalSTRS (USA)
- **Chair: Amanda White**, director, institutional content, Conexus Financial (Australia)

3.45 – 4.15PM

#### CIRCULAR ECONOMY

A circular economy provides a framework that fosters innovation and decouples growth from finite resource consumption and environmental degradation. This session examines the importance of moving from a linear to a circular economy and how investors can play a part.

- Ellen Macarthur, founder, Ellen Macarthur Foundation (UK) - invited
- **Chair: Colin Tate**, chief executive, Conexus Financial (Australia)

4.15 – 4.45PM

#### INVESTOR-LED CHAT ROOMS

Investors will have the chance to join private chat rooms with speakers and their peers to discuss the themes of the conference including the fallout of the US election and what their outlook is for 2021. Using special networking technology this dedicated session will allow interactivity among delegates to discuss key themes. The "rooms" or "tables" will be hosted by leading investors from around the world.