



INTEGRATING ESG INVESTMENT STRATEGIES IN PORTFOLIO MANAGEMENT - AN AFRICA PERSPECTIVE

Green Growth Paradigm for Africa - Investment Strategies for Sustainable Value Creation

5TH AUGUST 2011, JOHANNESBURG STOCK EXCHANGE AUDITORIUM, SOUTH AFRICA

AN EVENT FROM



MARKET INTELLIGENCE PARTNER

AFRICONOMIE

STRATEGIC PARTNERS



The global finance and investment community is witnessing increasing debate on the extent to which Environmental, Social and Governance (ESG) factors must be integrated into mainstream investment analysis to enhanced long-term investment performance and value creation. Globally, 227 asset owners and 496 asset managers have committed to integrating ESG consideration into their investment and stewardship approaches by signing up to the UNPRI. This is a strong indication that UNPRI has become a mainstream consideration of innovative asset owners and investment managers. Also, leading financial indices (MSCI indices and FTSE) and data providers (Bloomberg and Thomson Reuters) launch ESG ratings and tracking products. Thus giving institutional investor and fund managers access to tools that strip down a company's ESG practices by environmental management, climate change, human and labour rights, supply chain labour standards, corporate governance etc.

The Integrating ESG Investment Strategy in Portfolio Management Forum – An Africa Perspective is a tailored interactive forum designed to explore strategies employed by institutional investors and portfolio managers in integrating ESG issues into their investment decisions. It will also examine emerging investment strategies and best practices employed by Asset and investment managers to enhance sustainable value creation and improve long-term portfolio performance; thus creating value for their stakeholders. Africa is a unique market, with unique set of issues and challenges to consider when implementing ESG Integration; this forum sets the stage for Africa's leading asset owners, investment manager, financial and investment community to explore these issues.

This unique platform presents an opportunity for Africa's finance and investment community to meet, share, network, collaborate and discuss Environmental, Social and Governance (ESG) issues in the Africa context. Participants will debate challenges and issues unique to Africa, hear case studies and lessons from successful ESG Integration and discover how Africa's investment community need to adapt its strategies for a successful and holistic ESG Integration. Delegates will hear from asset owners and investment managers in Africa, Europe and US who will bring their practical knowledge and insights on best practices in integrating ESG issues into portfolio management of diverse asset classes.

Why Attend the 2011 Africa ESG Forum?

- **DISCUSS** global and local ESG Integration and Responsible Investment trends with expert industry speakers
- **UNDERSTAND** the current market dynamics and its potential impact on your investment decisions and portfolio operations
- **HEAR from profile speakers with practical experience and innovative implementation strategies of ESG Integration**
- **LEARN** from select experts who will share practical experience that will help you make informed investment decisions
- **NETWORK** with senior executives who will share their views on the success and challenges of ESG Integration

Who Attends?

The Integrating ESG Investment Strategies in Portfolio Management Forum will attract professionals from Africa's finance and investment community. Senior Executives from multilateral development banks, commercial and investment banks, institutional investors, Asset owners (pension funds, insurance companies, foundations, HNWs and family offices), asset managers, private equity houses, hedge funds, corporate CSR/investor relations departments, research analysts, SRI research firms, consultants and investment intermediaries, lawyers.

Sponsorship Opportunity

The ESG Forum confers upon its sponsor absolute authority and quality status in the Africa's Finance and Responsible Investment Industry. The summit will establish you as a proactive player in the industry and pioneer of practical ESG Integration initiatives in Africa. Sponsoring this event will offer you unrivalled cost-effective and dedicated marketing exposure. It will increase your exposure and brand recognition among key players in Africa's Finance and Responsible Investment industry; and will enable you to develop relationships within this network. For more information on sponsorship opportunity, please contact:

Michael Ndinisa

Executive Director, MNCapital
Telephone: +27 76 058 4044
Email: michaeln@mncapital.co.za

Peace Natachy

Sales Executive, Africonomie
T: +44(0)208 870 6620 | M: +44(0)7550 363 444
Email: pugbajah@afri-conomie.com

MNCapital

MNCapital aims to provide clients with the information and intelligence they need to sustain and maximise a valuable competitive advantage in the fast moving African business environment. At MNCapital we are dedicated to helping our clients achieve their goals by providing world-class global business intelligence services and information to assist in strategic and effective decision

www.mncapital.co.za

Africonomie Group

Africonomie is one of Africa's leading professional services firm which delivers specialist content, information and advisory services to emerging markets businesses, organisations and governments. With leading content and information platforms focused on policies and investment in the banking and finance, energy and power, manufacturing, real estate and telecoms sector. And a portfolio of services which includes a series of established events, training and market report.

www.afri-conomie.com

AFRICA ESG FORUM | FRIDAY, 5 AUGUST 2011

08:30 – 09:30

Summit Registration and Morning Refreshment

09:30 – 09:40

Summit Opening and Forum Overview

09:40 – 10:00

Overview of the ESG Principles: What is ESG Integration? And what is the rationale behind its growing importance? Why is it relevant to Africa Investment Community?

10:00 – 10:30

UNPRI – Update on recent ESG developments. What are the global perspectives on ESG Integration? What are the challenges of Implementing of ESG Principles in Africa?

10:30 – 11:00

Networking Break

11:00 – 11:50

Transparency and disclosure: ESG disclosure as part of a holistic risk management process. How can portfolio managers integrate ESG issues into Investment risk strategy? Arguing the case for PRI survey as a robust reporting tool.

11:50 – 12:40

Understanding the practical application and integration of ESG Principles across asset class (Private Equity, Listed Equities, Fixed Income, Microfinance, Commodities and Infrastructure funds). Practical Assessment of the dynamics of fund size and ESG implementation.

12:40 – 13:40

Networking lunch

13:40 – 14:30

Human Capital Issues: Pioneering ESG responsibility continued professional development. What are the prospects of integrating ESG considerations into recruitment of portfolio and investment managers? Exploring strategies and processes for educating asset owners on the benefits of ESG Integration.

14:30 – 15:00

ESG Data Business – An unrivalled tool for informed decision-making process. What are the emerging trends and innovations in the ESG data sphere?

15:00 – 15:30

Networking Break

15:30 – 16:20

Achieving ESG Integration through collaborative engagement of the Industry. Improving corporate ESG performance via Shareholder dialogue, selecting and monitoring investment managers, enhancing internal and external relationships with clients and fund managers.

16:20 – 17:00

Making it Work in Africa: Governance and Policy Framework for realising ESG Integration. Fostering investor participation in policy and regulatory developments

17:00

Closing remarks and cocktail reception

*TBA-to be announced...the contents of this programme are subject to amendments at any given time...***SPEAKING AT THE 2011 AFRICA ESG INTEGRATION FORUM**

We work closely with a carefully chosen panel of leading preeminent decision-makers, policy-makers, regulators, asset owners and investment manager to put together a timely and relevant programme which truly reflects key issues for today's Responsible Investment industry. We are constantly seeking expert feedback and new contacts to consolidate our understanding of the issues facing the whole industry. If you would like to help drive the Integrating ESG Investment Strategy in Portfolio Management Forum programme, by becoming a speaker, suggest a topic or issue to be discussed, or propose a paper for the Summit, please contact Peace Natachy at pugbajah@afri-conomie.com or **+44(0)7550 363 444**.

2011 SPONSORS INCLUDE:

BOOKING FORM

Please register me for the Integrating ESG Investment Strategies in Portfolio Management Forum, 5 August 2011, Johannesburg

R 6,950 ZAR (plus VAT)

* Early Bird and Group Discount Available

DELEGATE DETAILS (Please complete in block letters)

Full Name(Mr/Mrs/Miss/Ms/Dr)

Email

Position

Full Name(Mr/Mrs/Miss/Ms/Dr)

Email

Position

Full Name(Mr/Mrs/Miss/Ms/Dr)

Email

Position

Full Name(Mr/Mrs/Miss/Ms/Dr)

Email

Position

Full Name(Mr/Mrs/Miss/Ms/Dr)

Email

Position

Company/Organisation

Address

City Post/Zipcode Country

Tel Mob Fax

Type of Business

How did you hear about the event?.....

PAYMENT METHOD

Please charge my:

Bank Transfer Visa MasterCard

Card Billing Address:.....

City Country

Card Holder's Name:

Signature:

Card Number:.....

CVC No. (Last three digits behind the card):.....

Valid From/...../..... Expiry Date/...../.....

AUTHORISATION

Please confirm our attendance to the **2011 Integrating ESG Investment Strategy in Portfolio Management Forum:**

Full Name (Mr/Mrs/Ms/Dr).....

Email Tel

Position Department

Payment Date.....Signatory Date

Signature

TO REGISTER (Please select one of the following options)

- Book Online at www.
- Complete and email form to **pugbajah@afri-conomie.com**
- Call the booking line on +27 76 058 4044

For Sponsorship Opportunities Contact:

Michael Ndinisa
Mob: +27 7 6058 4044
Fax: +27 11 646 7251
E: michaeln@mncapital.co.za

Peace Natachy
Sales Executive, Africonomie Group
Telephone: +44(0)7550 363 444
Email: **pugbajah@afri-conomie.com**

DELEGATE PACKAGE

- Standard Delegate Fee **R 6,950 ZAR (plus VAT)**
- 3+ Delegates **R 6,255 ZAR per delegate (plus VAT)**
- 6+ Delegates **R 5,560 ZAR per delegate (plus VAT)**

Payment should be made within 7 working days from invoice date. Full payment must be made to guarantee entry to the 2011 ESG Forum.

YOUR DELEGATE PACKAGE INCLUDE

- Access for one delegate to participate in all conference sessions
- Pre-arranged business meetings with fellow policy makers, delegates and leading solution providers
- Attend all networking activities, Hosted lunches and drinks reception
- Electronic Summit materials with detailed information on all attendees
- Summit documentaton for future reference and knowledge sharing

TERMS AND CONDITIONS

Programme Content: We reserve the right to change the content of the programme without notice; changes might include the substitution, alteration or cancellation of speakers and / or topics and / or the alteration of the dates of the event.

Cancellation Policy: Delegate bookings are transferable but cannot be cancelled. Africonomie Group reserves the right to reject delegate applications. Cancellation or transfer requests must be made in writing (letter or fax) and reach this office 20 working days before the course commencement date.

Data Protection: We will not disclose your data outside without your permission. Your privacy is very important to us and we will always safeguard it. We will not share your data with any third party. We may use your details to bring to you notice of our products and services; please indicate if you wish to opt out of this service.

Event Code - 01ESGF11