



Dow Jones Sustainability Indexes

A cooperation of Dow Jones Indexes, STOXX Ltd. and SAM Group

Press Release
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SAM launches Dow Jones Sustainability North America Index

SAM, a leading financial provider in the growing area of sustainability investing, today expanded its family of Dow Jones Sustainability Indexes (DJSI) with dedicated benchmarks for North America and the United States. The Dow Jones Sustainability North America Index (DJSI North America) and Dow Jones Sustainability United States Index (DJSI United States) will comprise the top companies in terms of economic, environmental and social criteria from the two regions and provide solid benchmarks for sustainability-driven North American and US equity portfolios.

SAM and Dow Jones Indexes introduced the Dow Jones Sustainability World Index (DJSI World) as the world's first global sustainability benchmark in 1999. In 2001, the two partners were joined by STOXX Limited to expand the offering with European and Eurozone indexes. Today, the DJSI family is licensed to investment firms in 14 countries as underlying and benchmark for a variety of financial products including mutual funds, separate accounts, structured products and an exchange traded fund listed on Euronext. In total, over 4 billion US Dollars are presently managed in DJSI-based investment vehicles.

The launch of the DJSI North America and DJSI United States builds up on this strong platform. The new indexes will follow the same best-in-class approach and SAM assessment methodology as already applied for the established global, European and Eurozone offering. Accounting for issues such as corporate governance, climate change, supply chain standards, human capital development and labor practices, the analysis ranks companies in terms of sustainability in every industry. For the DJSI North America, the top 20% in each sector out of the biggest 600 North American companies are selected as index members. As of today's launch, 111 firms – 93 from the US and 18 from Canada – are included in the new index. The DJSI United States is the US subset of the DJSI North America and, thus, currently comprises 93 stocks.



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“This is obviously an exciting milestone for us. The DJSI North America and DJSI United States provide a significant expansion of our index family and the first equity benchmarks for the region based on SAM’s research methodology. We have been serving sustainability investors for more than 10 years and have been offering benchmarks in this field since 1999. The new indexes will leverage this experience to support investors in their implementation of sustainability-driven North American and US equity portfolios,” said **Alexander Barkawi, managing director, SAM Indexes.**

“The concept of sustainability has gained increasing recognition in financial markets over recent years as investing in companies committed to sustainability principles makes a lot of sense for the long term. These are well-run companies that are attuned to managing the risks and seizing the opportunities that arise from enlightened treatment of this world’s natural and human resources,” said **Michael A. Petronella, president, Dow Jones Indexes.** “With the addition of North American and U.S. sustainability benchmarks SAM Indexes takes a significant step in measuring the performance of companies that apply sustainability criteria to their business.”

“Indexes play a crucial role in the development and implementation of investment strategies. The availability of dedicated sustainability benchmarks is important to the expected investor demand and growth in this segment of the market,” said **Bailey Bishop, principal, State Street Global Advisors,** one of the speakers at today’s launch event for the DJSI North America and DJSI United States in New York.

Note to the editor:

Launched in 1999, the Dow Jones Sustainability Indexes track the financial performance of the leading sustainability-driven companies worldwide. Based on the cooperation of Dow Jones Indexes, STOXX Limited and SAM Group the indexes provide asset managers with reliable and objective benchmarks to manage sustainability portfolios. The Dow Jones Sustainability World Indexes (DJSI World) cover the top 10% of the biggest 2,500 companies in the Dow Jones World Index in terms of economic, environmental and social criteria. As a benchmark for European sustainability investments, the Dow Jones STOXX Sustainability Indexes



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(DJSI STOXX) cover the leading 20% in terms of sustainability of the companies in the Dow Jones STOXXSM 600 Index. The Dow Jones EURO STOXX Sustainability Index (DJSI EURO STOXX) is the Eurozone subset of the DJSI STOXX and, thus, tracks the financial performance of sustainability leaders in this particular region. The selection of index components follows a rules-based process defined in the DJSI Guidebooks. It is based on a thorough assessment of general and industry-specific sustainability criteria. The analysis is assured by an external auditor. Full details about the design philosophy, review methodology and index components are freely available at www.sustainability-indexes.com.

Further information:

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