

# Dow Jones Sustainability Indexes

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

Press Release  
Zurich, 7 April 2005

## **SAM crosses 3 billion EUR mark in assets based on the Dow Jones Sustainability Indexes and announces launch of Dow Jones Sustainability North America and Dow Jones Sustainability United States Indexes**

SAM today announced that assets managed against the Dow Jones Sustainability Indexes (DJSI) crossed the 3 billion EUR mark in March 2005. "This is a significant milestone for us", said Alexander Barkawi, Managing Director of SAM Indexes, the operating company for SAM's indexing business. "Asset managers in 14 countries use the DJSI family for a variety of financial products – including mutual funds, structured products and separate accounts. Their success in growing their offering and making sustainability-driven products available to their clients is a very encouraging and important feedback."

The reached milestone coincides with the start of this year's annual sustainability assessment for the DJSI family. Today, SAM sent out invitations to the biggest 2,500 companies worldwide including the biggest 600 companies in Europe to take part in its annual review for the indexes. The assessment will score companies with regard to general as well as industry-specific sustainability trends based on economic, environmental as well as social criteria. Research results and the new composition of the DJSI World as well as the European DJSI STOXX will be announced on 7 September 2005.

This year, SAM has also identified the biggest 600 companies in North America as the starting universe for a new addition to its series of sustainability benchmarks. Following the successful introduction of the DJSI World in 1999 and the DJSI STOXX in 2001, SAM will introduce the DJSI North America and DJSI United States on 21 September 2005.

"These new benchmarks are significant expansions of the family of Dow Jones Sustainability Indexes," said John Prestbo, Editor of Dow Jones Indexes. "Interest in the integration of economic, environmental and social criteria into global and regional portfolios is constantly on the rise. Based on the same corporate sustainability assessment as the existing DJSI family, the DJSI North America and DJSI United States will offer solid platforms for investors to implement sustainability criteria within their North American and US equity allocation."

### **SAM Indexes GmbH**

Seefeldstrasse 215, 8008 Zurich, Switzerland, Phone +41 1 395 28 28, Fax +41 1 395 28 50  
info@sustainability-indexes.com, www.sustainability-indexes.com

# Dow Jones Sustainability Indexes

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

## **Note to the editor:**

Launched in 1999, the Dow Jones Sustainability Indexes track the market 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 (DJSI STOXX) cover the leading 20% in terms of sustainability of the companies in the Dow Jones STOXX<sup>SM</sup> 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 verified by an external auditor. Full details about the design philosophy, review methodology and index components are freely available at [www.sustainability-indexes.com](http://www.sustainability-indexes.com).

## **Further information:**

Alexander Barkawi, Managing Director, SAM Indexes  
Phone +41 1 395 2829, E-mail: [alex@sustainability-indexes.com](mailto:alex@sustainability-indexes.com)

## **SAM Indexes GmbH**

Seefeldstrasse 215, 8008 Zurich, Switzerland, Phone +41 1 395 28 28, Fax +41 1 395 28 50  
[info@sustainability-indexes.com](mailto:info@sustainability-indexes.com), [www.sustainability-indexes.com](http://www.sustainability-indexes.com)