

## **SAM STARTS TENTH ANNUAL ASSESSMENT FOR DOW JONES SUSTAINABILITY INDEXES**

**ZURICH (24 April, 2008)** — SAM, the international investment group focused on sustainability, announced the start of the annual review for the Dow Jones Sustainability Indexes (DJSI). For the tenth time since the initial assessment for the indexes in 1999, SAM has sent out invitations to the largest 2'500 companies worldwide to participate in the company's yearly analysis. The assessment covers long-term economic, environmental and social criteria and reflects general as well as industry-specific sustainability trends.

Introduced in 1999, the DJSI family measures the financial performance of the world's sustainability leaders. Published cooperatively by Dow Jones Indexes, a leading global index provider, STOXX Limited, the leading European index provider and a joint venture of Dow Jones & Company, Deutsche Boerse and SWX Swiss Exchange AG, and SAM, the indexes provide reliable and objective benchmarks to measure and manage sustainability portfolios.

Companies participating in the annual review for the Dow Jones Sustainability Indexes will need to submit the answers to the SAM questionnaire as well as further documents by 4 June. The resulting changes to the DJSI family will be announced on 4 September. Companies that take part in the annual assessment can qualify for DJSI inclusion. They will also receive a SAM benchmarking report free of charge and thus a detailed feedback on their sustainability performance compared to the industry average and the sector's best-in-class company on a global scale for each criteria.

While in previous years the largest 2'500 companies were chosen from the Dow Jones Global Index, this year's list of invited firms was selected from the Dow Jones Wilshire Global Index – a benchmark that provides significantly wider geographical coverage. As a result and for the first time, the 2008 starting universe for the Dow Jones Sustainability Indexes also comprises companies from additional markets such as China, India and Russia. Companies from these countries could thus be potentially included in the Dow Jones Sustainability World Index after this year's review in September. As of the same month, the launch of a separate new index – the Dow Jones Sustainability World Index ex Emerging Markets – will provide investors with an exclusive focus on developed countries.

“Moving towards the tenth anniversary of the indexes is clearly an exciting milestone. We are delighted to make this move coincide with an expansion of our geographical coverage. China, India and Russia are obviously important markets for global investors. Bringing these and further emerging countries into our research universe allows us to reflect growing investor interest in these markets and to gauge sustainability leadership on a truly global scale,” says **Alexander Barkawi, Managing Director, SAM Indexes.** “

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Further information:

Alexander Barkawi, Managing Director, SAM Indexes

Phone +41 44 395 2832, E-mail: [alex.barkawi@sam-group.com](mailto:alex.barkawi@sam-group.com)

### **SAM**

SAM was established in Zurich in 1995 as the first investment group focused exclusively on the integration of economic, environmental and social criteria into investing. The company's services comprise asset management and indexing. In 1999, SAM teamed up with Dow Jones Indexes to launch the Dow Jones Sustainability Indexes (DJSI) – the first benchmarks tracking the performance of sustainability leaders on a global scale. Two years later, European index provider STOXX Limited joined this cooperation to expand the DJSI family with European and Eurozone sustainability benchmarks – the DJSI STOXX and DJSI EURO STOXX. In 2005, the DJSI family grew further with the introduction of the DJSI North America and DJSI United States, with the DJSI STOXX and DJSI EURO STOXX 40 indices following in 2006. 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.sam-group.com](http://www.sam-group.com) and [www.sustainability-indexes.com](http://www.sustainability-indexes.com).