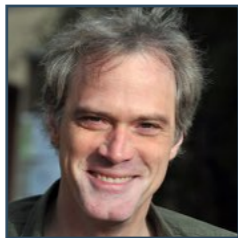


On the road to ethical investment: deepening the discussion - exploring needs, challenges and possible solutions to get going

Moderation



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We looked at different developments in the field of ethical and sustainable investments:

- Divest/Invest Campaign
- Post-Paris Agreement
- Impact investing



What they all have in common:

- ➔ The claim that foundations need to change their investment policies and investments

Different approaches/points of departure:

- ➔ targeting the fossil fuel industry (Divest/Invest)
- ➔ Investing into a 1.5 Degree scenario (Post-Paris)
- ➔ Concentration on your theory of change / values / mission (Impact Investing)

“Edgy” Questions:

- ➔ What are “transformational” investments?
- ➔ System change through investing into the capital markets?
- ➔ How do we fund the next / new economy through investments? Do we?

The Practicalities of ethical and sustainable investing, or of the pathway towards it

What are the steps towards a “sound” portfolio in terms of ethics, social justice values and sustainability?

- ➔ Screening your portfolio → Achieving coherence with vision, mission and values of the foundation
- ➔ Think positive! → From negative screening to a catalogue of positive criteria
- ➔ Internal structures → Convincing the “finance guys (and girls)”

Possible Agenda for the EDGE Ethical Investment Working Group

Practicalities



Big questions

✗ How to screen a portfolio?

✗ System change needs which investment policy?

✗ How to develop an investment policy aligned with your vision and design necessary internal processes?

✗ Investing without returns?

✗ Sharing deals and investments?

✗ Funding the new / next economy through investments?

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Questions for the discussion:

Practicalities



Big questions

- ➔ In terms of the working group: Where would you see yourself on the graph in terms of motivation and interest in becoming an active member of the working group?
- ➔ How would and could you contribute to the group?
- ➔ What would it need for you to become an active member (monthly calls, face-to-face meetings, mailing lists, etc.)?

use chat box and icons  to interact
click on  Raise Hand if you want to take the floor