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

Practicalies

✗ How to screen a portfolio?
✗ How to develop an investment policy aligned with your vision and design necessary internal processes?
✗ Sharing deals and investments?

Big questions

✗ System change needs which investment policy?
✗ Investing without returns?
✗ Funding the new/next economy through investments?
Questions for the discussion:

Practicalities

- 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.)?

Big questions

use chat box and icons 😊 to interact

click on 🙋 Raise Hand if you want to take the floor