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Executive Summary

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EXECUTIVE SUMMARY

2007 Report on Socially Responsible Investing Trends in the United States

OVERVIEW

Socially responsible investing (SRI) is thriving in the United States, growing at a faster pace than the broader universe of all investment assets under professional management. Roughly 11 percent of assets under professional management in the U.S. – nearly one out of every nine dollars – are now involved in SRI.

- ◆ SRI assets rose more than 324 percent from \$639 billion in 1995 (the year of the first Report on Socially Responsible Investing Trends in the United States) to \$2.71 trillion in 2007. During the same period, the broader universe of assets under professional management increased less than 260 percent from \$7 trillion to \$25.1 trillion.
- ◆ From 2005-2007 alone, SRI assets increased more than 18 percent while the broader universe of professionally managed assets increased less than 3 percent.

HIGHLIGHTS OF THE 2007 REPORT

SRI Assets

The 2007 Trends report identifies \$2.71 trillion in total assets under management using one or more of the three core socially responsible investing strategies—screening, shareholder advocacy, and community investing. In the past two years, social investing has enjoyed healthy growth, increasing from \$2.29 trillion in 2005. About one out of every nine dollars under professional management in the United States today is involved in socially responsible investing—11 percent of the \$25.1 trillion in total assets under management tracked in Nelson Information's *Directory of Investment Managers*.

Socially and Environmentally Screened Funds

Assets in all types of socially and environmentally screened funds -- including mutual funds, exchange-traded funds (ETFs), closed-end funds, other pooled products, and alternative investments rose to \$201.8 billion in 2007, a 13 percent increase over the \$179 billion tracked in 2005. Over the period covered in this Report, the number of socially and environmentally screened funds tracked increased from 201 to 260. Among the broader universe of socially and environmentally screened funds, US-registered investment companies, such as mutual funds (including those underlying variable annuity products), exchange-traded funds (ETFs), and closed-end funds, accounted for \$174.8 billion, managed by 184 different funds available through more than 60 different fund families.

- ◆ **MUTUAL FUNDS**—The largest share of socially and environmentally screened funds are mutual funds, with \$171.7 billion in total net assets invested in 173 different funds available in 358 different share classes. Of these socially and environmentally screened mutual funds, 19 of them with \$12.5 billion underlay variable annuity products.
- ◆ **EXCHANGE-TRADED FUNDS (ETFs)**—Eight socially and environmentally screened exchange-traded funds (ETFs) with \$2.25 billion in total net assets were identified for the first time in this Trends report. Over the course of 2007, other ETFs were launched to track indices addressing a variety of social and environmental concerns related to water, clean technology, alternative energy, and the crisis in the Sudan. Although ETFs accounted for only 1 percent of the total assets of all socially screened funds at the beginning of 2007, they promise to be a dynamic catalyst for SRI growth in the future.



FIGURE A

Socially Screened Funds • 1995-2007

(Assets In Billions)	1995	1997	1999	2001	2003	2005	2007
Number of Funds	55	144	168	181	200	201	260
Total Net Assets	\$12	\$96	\$154	\$136	\$151	\$179	\$202

SOURCE: Social Investment Forum Foundation

Note: The \$202 billion in assets tracked in socially screened funds in 2007 includes all funds, including alternative investments, analyzed in this year's Report for the first time, and other pooled products that are not aggregated into the total \$2.7 trillion in SRI assets identified in this report. Alternative investments and other pooled products are not aggregated into the total SRI universe in order to avoid potential double-counting. Assets in socially screened funds that are aggregated into the \$2.7 trillion total for SRI are from mutual funds, closed-end funds, and exchange-traded funds, and account for \$174.8 billion.

- ◆ **CLOSED-END FUNDS**—Three socially and environmentally screened closed-end funds with assets of \$850 million were tracked separately for the first time.
- ◆ **ALTERNATIVE INVESTMENT FUNDS**—An estimated \$5.3 billion in capital were identified under the management of 46 different socially or environmentally screened alternative investment vehicles, such as social venture capital, double- and triple-bottom-line private equity, and hedge funds, typically organized as unregistered limited partnerships or limited liability companies and available only to accredited institutional and high-net-worth investors.
- ◆ **OTHER POOLED PRODUCTS**—Nearly 11 percent of the total assets in all socially screened funds – \$21.7 billion – were invested through 30 other pooled products, typically commingled portfolios managed primarily for institutional investors and high-net-worth individuals.

The growth of socially screened funds tracked by the Social Investment Forum is attributable to many factors, including the growth of existing funds, the development of new funds, and the identification of pre-existing funds that may not have been captured in previous reports, thanks to continual enhancement of the Report's methodology. In keeping with this Report's conservative asset aggregation methodology, in order to avoid any potential double counting, Alternative Investment Funds and Other Pooled Products are not aggregated into the total \$2.7 trillion in SRI assets identified in this Report. See Chapter II for further details on screened funds and Chapter VII for further details on the Report's methodology.

Socially and Environmentally Screened Separate Accounts

With more than \$1.9 trillion in assets, socially screened separate accounts managed for institutional and high-net-worth individual clients constituted the bulk of SRI assets tracked in 2007. Socially and

FIGURE B

Socially Responsible Investing in the US • 1995-2007

(In Billions)	1995	1997	1999	2001	2003	2005	2007
Social Screening	\$162	\$529	\$1,497	\$2,010	\$2,143	\$1,685	\$2,098
Shareholder Advocacy	\$473	\$736	\$922	\$897	\$448	\$703	\$739
Screening and Shareholder	N/A	(\$84)	(\$265)	(\$592)	(\$441)	(\$117)	(\$151)
Community Investing	\$4	\$4	\$5	\$8	\$14	\$20	\$26
Total	\$639	\$1,185	\$2,159	\$2,323	\$2,164	\$2,290	\$2,711

SOURCE: Social Investment Forum Foundation

NOTES: Social Screening includes socially and environmentally screened funds and separate account assets. Overlapping assets involved in Screening and Shareholder Advocacy are subtracted to avoid potential double-counting. Tracking Screening and Shareholder Advocacy together only began in 1997, so there is no datum for 1995. There are also potentially overlapping assets in the relatively small screened funds categories of Alternative Investments and Other Pooled Products; therefore these categories are also excluded from the SRI universe aggregated in this Report. See Chapter II for details.

environmentally screened separate account assets have increased nearly 28 percent from the \$1.5 trillion identified in 2005.

- ◆ Institutional Investors—\$1.88 trillion in assets are managed in institutional client accounts, a 27 percent increase over the \$1.49 trillion identified in 2005.
- ◆ High-Net-Worth Clients—Investment advisers managed \$39.5 billion for individual clients, a \$22.2 billion increase over the \$17.3 billion identified in 2005.

Shareholder Advocacy

The average level of shareholder support for resolutions on social and environmental issues increased 57 percent from 9.8 percent in 2005 to 15.4 percent in 2007, a record high. The total number of resolutions increased from 360 in 2005 to 367 in 2006. Institutional investors that filed or co-filed resolutions on social or environmental issues controlled \$739 billion in assets in 2007, a more than 5-percent rise over the \$703 billion in assets counted in 2005.

Community Investing

Assets in community investing institutions rose nearly 32 percent from \$19.6 billion in 2005 to \$25.8 billion in 2007. The field also continues to expand in terms of the number and diversity of community investing products and services available to US investors.

MAJOR FORCES BEHIND SRI GROWTH

The following factors are key to the robust growth of SRI:

- ◆ Money managers are increasingly incorporating social and environmental factors into their investing practices, acknowledging the demand for social investing products and services from institutional and individual investors, socially concerned high-net-worth clients, individuals seeking SRI options in their retirement and college-savings plans and “mission-driven” institutions such as foundations, endowments, labor unions, and faith-based investors.
- ◆ New products and fund styles are driving growth in socially and environmentally screened funds, especially ETFs and alternative investment funds such as social venture capital and double- and triple-bottom-line private equity.
- ◆ A growing concern about climate change and its risk for portfolios is intensifying the interest in SRI among money managers. Investor demand is growing for portfolio opportunities in clean and green technology, alternative and renewable energy, green building and responsible property development, and other environmentally driven businesses.
- ◆ A large and expanding number of institutional investors are actively supporting shareholder resolutions on social, environmental, and corporate governance issues and joining investor coalitions, such as the Investor Network on Climate Risk, to make their concerns known about the risks and opportunities associated with issues such as climate change.
- ◆ Increasing numbers of institutional investors, fund families, and money managers are incorporating criteria related to the crisis in the Sudan into portfolio management and shareholder advocacy, whether through targeted divestment or active engagement with companies exposed to the risks of doing business in such a volatile, repressive regime.
- ◆ The expansion of market-rate opportunities and other industry developments are making it easier for a broad range of investors to participate in the expanding field of community investing. Institutional investors are proactively allocating portions of their portfolio to community investing options in order to deepen the social impact of their investments. Investors are also increasingly embracing international microfinance opportunities to promote positive social and economic development abroad.



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Social Investment Forum

A Note from the Social Investment Forum CEO:

The 2007 *Report on Socially Responsible Investing Trends in the United States* (TRENDS) is a major undertaking, made possible only through the work of scores of individuals...consultants, SIF staff, and members of SIF who contribute their knowledge and expertise to the analysis underpinning this report.

The other major contribution to TRENDS is made by the sponsors who made this report possible through their generous financial support. SIF thanks TIAA-CREF, Calvert Group, ClearBridge Advisors, Co-op America, Self-Help Credit Union, Access Capital Strategies, Bridgeway Capital Management, Christian Brothers Investment Services, Citizen Advisers, Domini Social Investments, First Affirmative Financial Network, KLD Research and Analytics, Neuberger Berman, Risk Metrics Group, The Spectra Funds, Trillium Asset Management Corp. and the United Methodist Church General Board of Pension and Health Benefits. Our generous sponsor support has made the 2007 TRENDS report a reality!

The members of SIF are the lifeblood of our organization. We invite you to join our 500 members and be a part of the growing field of socially responsible investing. Please see our ad on page 90 and learn more about what the Social Investment Forum has to offer.



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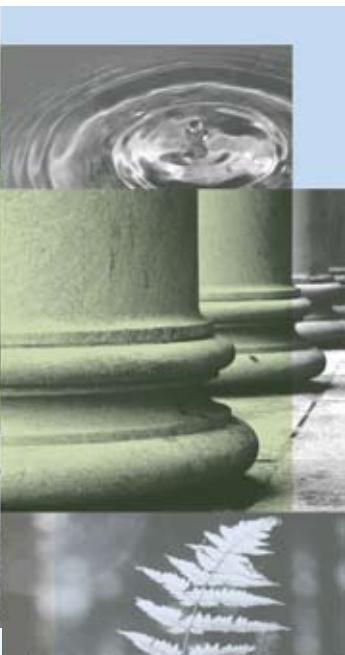
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