2018 SRI and Managing Carbon Emissions in Institutional Asset Management - U.K.

2018 U.K. Institutional Investors

July 31, 2018

Executive Summary:

This report provides detailed information from institutional investors in the U.K. on SRI considerations for manager decisions and carbon exposure tracking.

Methodology:

Greenwich Associates' 31st annual U.K. institutional investor research is based on in-depth interviews conducted in the first quarter of 2018 with 381 interviews of the largest institutional funds in the United Kingdom.

These institutional investors are U.K. corporate funds, local authorities and other institutional funds each with over £100 million in total defined benefit plan assets, defined contribution plan assets, or other institutional assets.

- 288 corporate pension funds
- 55 local authority pension funds
- 38 other institutional funds, including non-corporate or local authority pension funds, charities, endowments, and insurance companies

Senior fund professionals were asked to provide quantitative and qualitative evaluations of their investment managers' investments and client service capabilities, qualitative assessments of those managers soliciting their business, and detailed information on important market trends.

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