



UEASIF Student Managed ESG Investment Fund

Summary

- What is UEASIF?
- Fund structure
- UEASIF Donations and Growth
- UEA contribution
- Investment Process examples
 - Research
 - Investment Proposal
 - Shadow investment fund performance
- UEA Investment Society Support



What Is UEASIF?

UEA's student Investment Society has been running a shadow investment fund for 3 years and is now looking to manage a real investment fund with an ESG driven investment policy, with the following aims:

- UEASIF equips UEA Students with the right skills that are sought after in the Buy-Side industry.
- UEASIF enhances the learning experience of students at UEA by allowing members to grow their practical experience of investment and finance.
- UEASIF produces innovative research by working together with industry professionals and practitioners.
- UEASIF seeks to outperform the FTSE4Good and FTSE350 Indexes with ESG at the heart of our investment philosophy.
- UEASIF seeks to prove that responsible investment, and choosing ESG market leaders will create positive returns.
- UEASIF will pay its profits to charitable causes e.g. local social and environmental initiatives, including education.

How Are We Different To Other Student Managed Funds?

- UEASIF is a community of like-minded students who can stay involved in the ESG fund even after graduating through the Student Advisory Committee.
- Speakers (previous and new), Alumni and companies give crucial talks to our members to prepare them for interviews and graduate jobs.
- Our Annual Celebration and AGM in London maintains a healthy relationship with speakers, whilst allowing our members and UEA to grow their network.
- ESG is at the heart of the fund, and our performance will be evidence that investing can generate superior returns if done responsibly.

STEP 3

UEA Investment Executive – Final Decision and Execution

1. Made up of a decision-making UEA member of staff and selected alumni with relevant experience (similar to UEA Enterprise Fund Committee)
2. Meet Quarterly to review the report and suggestions of the portfolio changes.
3. Votes/Makes a final decision on review.
4. Executes trades suggested in report through the Fund.

STEP 2

Student Advisory Committee – Review

1. Made up of alumni of the Investment Society & UEA, academics and local financial services firms to be appointed by the Investment Society
2. Members on this committee will give advice and a professional insight over UEASIF portfolio proposals over factors such as timing, market conditions and risk.
3. Proposals will be approved before being sent off to the Investment Executive.

STEP 1

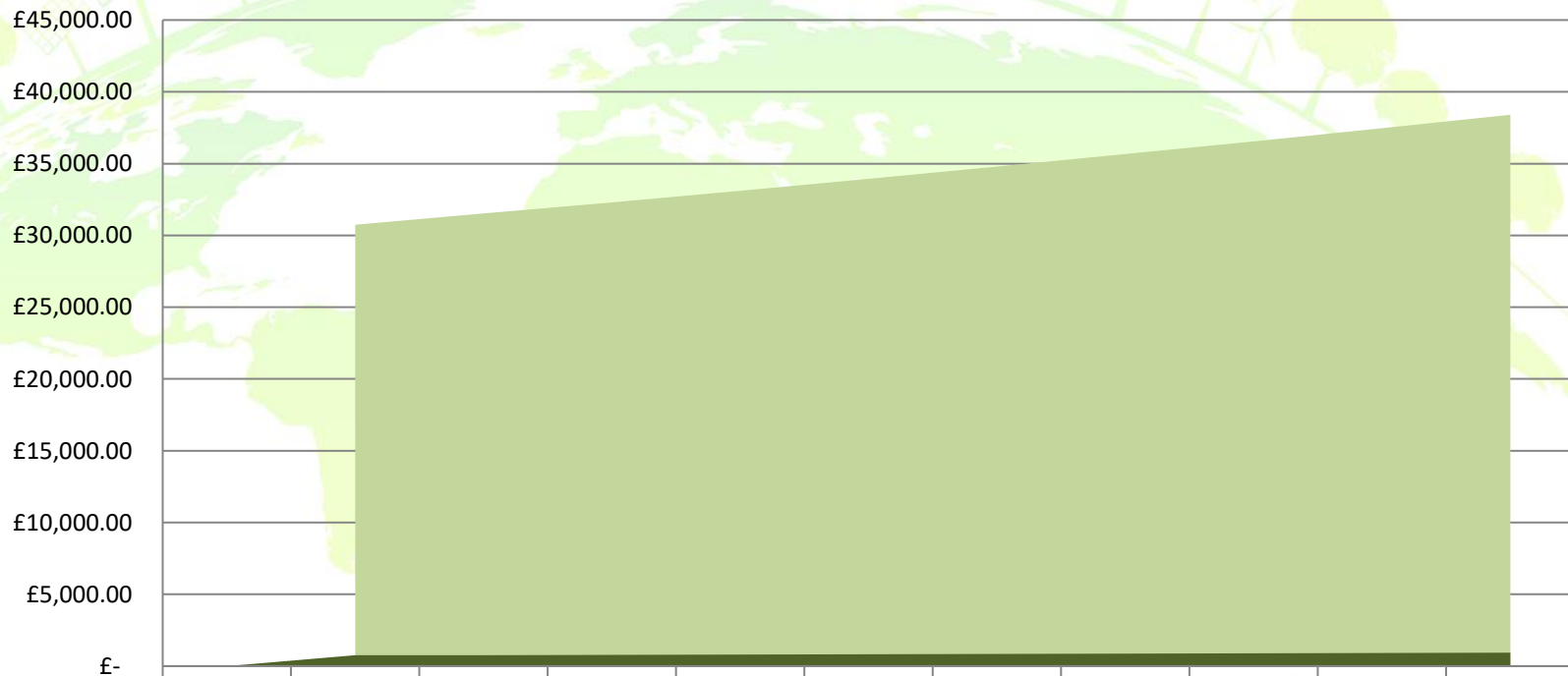
UEASIF Students

1. Student Portfolio Managers and teams put together the portfolio proposal or new changes to the portfolio. This is edited and finalised with help from the Student Advisory Committee, before the Managing Director, Director and President pitch the portfolio to the UEA Investment Executive.

UEASIF Donations & Growth


At 5% growth per year for 10 years donating 50% of profits made, UEASIF would have donated £8402.86 on an investment of £30,000 in donations.

AUM And Profits Donated Over 10 Years at 5% Average Annual Growth



	Year	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Assets Under Management (AUM)		£30,750.00	£31,519.00	£32,306.95	£33,114.62	£33,942.49	£34,791.05	£35,660.83	£36,552.35	£37,466.16	£38,402.81
Total Annual Profits Donated	£-	£750.00	£769.00	£788.00	£807.67	£827.87	£848.56	£869.78	£891.52	£913.81	£936.65

UEA Contribution

- 
- The fund from alumni and external donations is held with UEA.
 - UEA executes the trades up to 4 times a year through the agreed broker.
 - UEA provides the decision-maker for the fund Executive Committee, to sit for 1.5 hours 4 times a year. The Investment Society will take minutes at each of these pitch meetings.
 - Support is received from the development office for the student fundraisers.

Investment Process: Research

“The results strongly support the benefits of student funds in helping the long-term development of students and in achieving learning goals such as discipline specific knowledge, communication skills, leadership skills, presentation skills and interpersonal skills. The results were consistent between genders and years since graduation.”

John Clinebell and Jody Murphy
Journal of Financial Education
Vol. 42, No. 3-4 (December 2016), pp. 304-312

ESTABLISHED 1998
EUTIC

Founded in 1998, the Edinburgh University Trading & Investment Club (EUTIC) manages one of the UK's largest student-run real money investment portfolios.

Our objectives are to educate students about the world of finance, give members real-life experience in trading stocks, provide opportunities to network with some of the world's most prestigious firms, and help members pursue careers in the financial services industry and other leading graduate recruiters.

600

Members

£ 57000

Assets under management

20

Years of Experience



FTfm European business schools + Add to myFT

Imperial College launches student-run fund

University's endowment provides £100,000 to seed investment vehicle



The project is divided in two sections: a market-neutral equities portfolio and a quantitatively managed portion © Sergio Azenha/Alamy

Owen Walker SEPTEMBER 21 2019

25

London's Imperial College Business School has become the latest academic institution to launch a student-run investment fund, where scholars pit their wits against professional asset managers.*

Student-managed funds, which take academic theory from the lecture theatre and put it to work in the markets, are popular in the US, with initiatives at several business schools, including Columbia University in New York and the University of Michigan.

Investment Proposal: Apple Inc.

ESG Performance - SDG



- Equal pay to all employees
- 50% of new hires in 2018 from historically underrepresented minorities in tech
- 39% of leaders under 30 are women (29% of leaders overall)



- Operating on 100% renewable energy
- 25 operational renewable projects
- 5.5GW of clean energy commitments



- UN climate action award
- 100% powered by renewable energy
- Scope for reduction in energy consumption through devices

ESG Performance - Environment

- 100% of global facilities powered by 100% renewable electricity (2018).
- 2/3rd from Apple created projects
- 70% reduction in average device energy consumption over 10 years
- Diverted more than 508 million lbs of electronic waste from landfills.
- Mac Mini – Worlds most efficient desktop computer



ESG Performance - Governance

- Comprehensive privacy policy for iPhone use – device centric (encrypted messages, temporary personal data storage, minimal cloud backups)
- Acquired Silk labs – privacy centric AI startup in home security
- Effectively reducing debt-bonded labour (\$30.9m repaid since 2008, \$616k in 2018)
- Stop Slavery Award – Thomson Reuters foundation
- Removed Facebook “research” app and rights



Apple ESG Performance

Overall - 83rd percentile (Outperformer)

Measure	Peer average (%)	Apple (%)	Percentile
Environment	68.5	68.5	99 th
Social	64.8	60.0	56 th
Governance	64.2	61.4	43 rd
Controversy	2	3	



Apple ESG Performance

- UN included Apple in 2019 Climate Action awards
- ESG responsibility of the company increased considerably under Tim Cook
- Only company to receive Clean Energy Index of 100% - Greenpeace Clicking Clean
- 16 years perfect score Human rights campaign Corporate Equality Index



ESG Performance - Social

- Tim Cook only openly gay CEO of a Fortune 500 company. Praised for efforts in workforce diversity
- 3.6m employees participated in education and skills building programs to date (empowerment and life skills, vocational skills, career advancement)
- Supplier Employee Education and Development (SEED) program
- Launched health clinics called AC Wellness for employees and their families
- 17.3M+ employees trained on their rights since 2007

ESG AWARDS & RECOGNITION

- Recognized among FORTUNE's World's Most Admired Companies for 17 consecutive years and ranked No. 1 in IT Services category.
- Dow Jones Sustainability Index and FTSE4GOOD Global Index constituent since 2004.
- Recognized among Ethisphere's World's Most Ethical Companies since 2006
- Ranked No. 1 on Barron's New Most Sustainable International Companies list.
- Ranked No. 1 on Refinitiv (formerly Thomson Reuters) Diversity & Inclusion Index since 2015.
- Received a perfect score on Human Rights Campaign's Corporate Equality Index each year since 2008
- Included in Hall of Fame and recognized among Working Mother's 100 Best Companies since 2002

FORTUNE
WORLD'S MOST
ADMIRABLE
COMPANIES
2019

REFINITIV
TOP 100 COMPANY 2019
Diversity and Inclusion Index

ETHISPHERE
GOOD. SMART. BUSINESS. PROFIT.

FTSE4Good

HUMAN RIGHTS CAMPAIGN
BEST PLACES TO WORK
CORPORATE EQUALITY INDEX | 2019

B
BARRON'S

ESG Ratings

ACCENTURE PUBLIC LIMITED
COMPANY
(ACN)

MSCI
ESG RATINGS

AAA

CCC B BB BBB A AA AAA

Industry: Software & Services
Country: Ireland

Accenture's rating remains unchanged since June, 2016.

Accenture is a **leader** among 121 companies in the software & services industry.

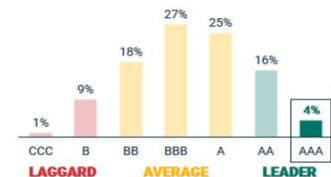
ESG Rating history

MSCI ESG Rating history data over the last five years or since records began.



ESG Rating distribution

Universe: MSCI ACWI Index constituents software & services, n=121.



Data Source: MSCI ESG Research

Positive/Negative screening

Positive

- Identifies non-financial metrics as areas of "Very High" impact to its business (Talent Attraction & Development and Employee Well-being)
- With the exception of the CEO/Chairman role, the board is 100% independent. 36% of its directors are women, and it boasts 55% ethnic diversity.

Negative

- No involvement with any unethical or immoral activities.


Investment Proposal: Accenture PLC



ESG LAGGARD	AVERAGE	ESG LEADER
Accenture is not a laggard on any of the Key Issues that we evaluated for its industry.	HUMAN CAPITAL DEVELOPMENT CARBON EMISSIONS	CORPORATE GOVERNANCE PRIVACY & DATA SECURITY OPPORTUNITIES IN CLEAN TECH

Virtual Fund Results

60			Change (%)	AER (%)
61	Technology		24.685	101.620
62	Consumer goods		12.535	54.727
63	Energy		14.475	57.482
64	Financials		13.176	56.654
65				
66				
67		Overall		16.218

Our fund is averaging 16% (23/02/2020) over 12 stocks in 4 months. The stock choices we have decided to put in the first proposal (starting with 6 out of 12), have the best ESG scores and are actually the best performers as well!

TECHNOLOGY - Ben B.	21/11/2019	23/02/2020	Change (%)	AER (%)	Profit
 NVIDIA Corp (XNAS:NVDA)	\$ 210.00	\$ 312.04	48.589	188.668	102.036

ENERGY - Marcus P.	21/11/2019	23/02/2020	Change (%)	AER (%)	Profit
 Albemarle Corp (XNYS:ALB)	\$ 65.13	\$ 89.74	37.786	146.722	24.610
	05/12/2019	23/02/2020	Change (%)	AER (%)	Profit
 Vestas Wind Systems A/S (XCSE:VWS)	659.00 kr.	712.40 kr.	8.103	36.971	53.400

Investment Society: Success so far

UEA Investment Society and UEASIF have worked hard to create and maintain a Network of speakers, industry experts, academics and UEA alumni that is increasing our national exposure as well as creating success stories amongst our members!

The image shows a LinkedIn profile for Terri Duhon, Board Director, Keynote Speaker, Educator, Finance and Risk Expert. Below the profile is a post with a video of her presenting in front of a screen titled "My life path". The screen displays a flowchart with stages: "My life path", "Career", "Education", "Other Careers", and "Why retire?". The "Career" stage lists "Board Member", "Chief Executive", "Public Speaker", and "Why retire?". The "Education" stage lists "University of Exeter", "University of Cambridge", and "University of Warwick". The "Other Careers" stage lists "Why retire?". The post includes a "Thank You" slide and a group photo of the audience. The post has 179 likes and 25 comments.

The image shows a Facebook post by Fraser Holmes-Mackay, Analyst at Goldman Sachs. The post text reads: "Last week I had the opportunity to give a talk at #uea to the UEA Investment Society. It was a privilege to be able to share some of my experiences of applying to graduate jobs, working at Goldman Sachs, and promoting #launchwithgs. I'm always impressed with the level of engagement and enthusiasm from the students and I'm incredibly excited to be involved with the society and the launch of their new ESG fund (UEASIF). #esg #investment #fund". The post includes a video of the UEA Investment Society building. The post has 40 likes and 2 comments. The reactions section shows 9 reactions, including "Celebrate" and "Comment". The post has a comment box with the text "Give your good wishes..." and a camera icon.

Investment Society: Momentum

- Our efforts have created a lot of momentum!
- We no longer have to labour tirelessly to get speakers to come to UEA. Instead, we are being approached by industry experts on an international scale such as Dr. Miranda Brawn <http://mirandabrawn.com/about-2/>, who contacted us and asked to come to UEA for an event (date is being booked)!
- Our most recent UEASIF event with Darren Pilbeam (MD at Natixis Investment Managers) had almost a 100% turnout of fund members on a busy afternoon. We are working with Darren to get better research for our analysis.

We received the “Highly Commended” Award at the Undergraduate Employability Best University Society Awards 2020!



Investment Society: End of Year Celebration & AGM



For the first time ever, we are holding our award ceremony and UEASIF Annual General Meeting on the rooftop of the Royal College of Pathology in Central London on the 1st May 2020!


Our supporters and speakers are invited and have said yes, this is an opportunity for members to share a drink with their possible future employer.

We are booked in, with support from NBS and SU (hopefully economics as well).

Studios Education Ltd (Film Crew) are going to create a professional promo video for the society that interviews students and speakers.




Investment Society: Exposure




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[Change in Governance&Code - NEDonBoard. Non-Execs & Board Members Professional Body, London 28 Jan £80.](#) Ad ...



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Earlier this week [Michael Prinz](#), President of the Investment society at the [University of East Anglia](#) visited Linear Investments to talk about his role as president, student managed investment funds and the importance of ESG in the investment world".

Watch the video interview with [Kate Horne](#) here:

<https://lnkd.in/gQvcvd>

#esg #fundresearch #dfm #investment #investmentresearch



University Investment Societies: what do they offer and how to get involved
linearinvestment.com

👍 🌱 24 • 1 Comment

Reactions

