

**SUSTAINABLE AND RESPONSIBLE INVESTING
in ASIA**

8th APRIL 2002

**SINGAPORE VALUES –
VALUES FOR SINGAPORE**

**THE SRI RETAIL EXPERIENCE
IN SINGAPORE**

Madeleine Lee, CFA
Chief Investment Officer
Athenaeum Fund Management
- “Chief Architect” , UOB UNIFEM FUND

Who is UNIFEM Singapore?

- A chapter of United Nations Development Fund for Women

Mission

- To help women & families in developing countries in Asia by tapping on Singapore's resources and expertise as a regional technological, financial, health and education center. It aims to help women and families help themselves, by increasing their economic capacity and enable them to be self sustainable.

INITIATIVES

Hhealth

Batam, Thailand

Education

Bintan, Nepal

Livelihood Enhancement

Vietnam, Nepal

Poverty Alleviation

Thailand

THEME FOR 2002

Trainning

Education

Empowerment

UNITED GLOBAL UNIFEM FUND

- A global equities unit trust/mutual fund registered in Singapore, investing in companies with good investment prospects **AND GOOD WOMEN & FAMILY FRIENDLY POLICIES**

RESEARCH EFFORT

- Original research on major Asia Pacific listed companies
- Ranking of major Asia Pacific listed companies
- On-going survey efforts

BREAKTHROUGH/SUCCESSSES

- Co-branding between private sector and not-for-profit organisation
- Original concept in Asia
- Direct funding benefit to UNIFEM Singapore
- Empowering women in workplace
- Empowering women in financial management
- Empowering women through UNIFEM projects/programmes

BREAKTHROUGH/SUCCESSSES

- Profile of Fund:
 - 75% women
 - 75% first time investors
 - 75% blue collar workers
- Some acceptance of do -good funds

LESSONS/TAKE AWAY

- SRI virtually an unknown idea in Singapore
- One must understand product to sell product
- Confusing message -Returns or conscience?
- Timing is important in retail products
- Performance speaks volumes

FUTURE OPPORTUNITIES

- Feeder funds/white labelling opportunities
- Enlightening companies through shareholder voice
- Use of Research for advocacy

Useful Contacts :

UNIFEM Singapore
Nassim Road
Singapore 258373
Tel: 65-6238-6761

UOB Asset Mgt Ltd
#03-00 UOB Plaza 2
Singapore 048624
65-6532-7988