



## Press Release

Melbourne / Zurich, 17 February 2005

### SAM launches Australian Sustainability Index

In cooperation with EPA Victoria (Environment Protection Authority) and The Australian, SAM launched the Australian SAM Sustainability Index (AuSSI). The index will track the financial performance of around 70 Australian companies that lead their industry in terms of economic, environmental and social criteria.

“At VicSuper, we have for many years seen sustainability as essential for long-term shareholder value.” added **Bob Welsh**, CEO of VicSuper – one of Australia's largest superannuation funds with close to 190,000 members. “Short-termism is a significant risk to the competitiveness of Australia’s corporate sector. The AuSSI offers investors and other stakeholders an important platform to take a long-term view.”

The AuSSI is Australia’s first index to measure the financial performance of the country’s sustainability leaders. It comprises the top 40 percent in terms of sustainability out of 184 companies listed on the Australian Stock Exchange. Based on the methodology of SAM, it applies the same research criteria as the globally recognized Dow Jones Sustainability Indexes for which SAM selects sustainability leaders on a worldwide scale.

The assessment covers a wide range of general and industry-specific issues relating to the three dimensions of sustainability – economic, environmental and social. Examples of the criteria include corporate governance, eco-efficiency, human resources management, and stakeholder relations. The integration of sustainability aspects into a bank’s project financing activities, water use among food companies, and strategies to reduce greenhouse gas emissions in the oil as well as the automotive sector are further examples.

Based on this analysis, SAM ranks companies within their industry according to sustainability scores. The AuSSI comprises the Australian leaders from each sector and tracks the development of their share price on a daily basis.

As a result, it defines a universe of best-in-class companies and provides investors with an objective benchmark for the growing amount of sustainability-driven Australian portfolios. Index values will be calculated by Dow Jones Indexes and published in *The Australian* on a



daily basis starting today. A full review of index members will be performed on an annual basis. In addition, daily monitoring of the AuSSI members by SAM will allow prompt reaction to important new developments.

“SAM has been in the index business since 1999. The successful launch of the Dow Jones Sustainability Indexes and its current use by asset managers in 14 countries have confirmed our conviction that objective and transparent benchmarks play an important role for sustainability investors. Based on this strong platform, SAM is now expanding its existing range of global and regional benchmarks to include country-specific sustainability indexes as well. We are delighted to make the first step in this direction here in Australia,” said **Alexander Barkawi**, Managing Director of SAM Indexes.

“EPA Victoria is aware of the growing recognition of the Dow Jones Sustainability Index among investors and companies. The AuSSI is positioned to foster a similar dynamic in the Australian market and we are very pleased to support SAM in targeting this objective as it will enhance the perception of sustainability.” said **Mick Bourke**, EPA Victoria Chairman.

**For more information please contact:**

Alexander Barkawi, Managing Director, SAM Indexes  
Francis Grey, Research Manager, SAM Australia  
Phone: +61 3 9696 4011,  
e-mail: alex.barkawi@sam-group.com, francis.grey@sam-group.com  
[www.aussi.net.au](http://www.aussi.net.au)

---

**SAM Group** was founded in 1995 as an independent financial services group sustainability investments. Today SAM is one of the world's leading institutions in this sector. Its clientele includes banks, insurance companies, pension funds, foundations and private clients.

SAM carries out systematic research to identify successful companies that meet sustainability criteria. The integration of these future-oriented criteria into the investment process provides investors with a high degree of security, transparency and an attractive return.

In addition to individual mandates for institutional investors and private clients, SAM offers financial products in the areas of global & European equities, innovative energy technologies, sustainable food production, water, resource efficiency, sustainability pioneers, sustainability leaders and private equity.

SAM's expertise is based on its own independent research and an active worldwide sustainability network. Together with Dow Jones Indexes and STOXX, SAM has launched a family of sustainability indexes to track the performance of companies that are industry leaders in terms of sustainability. As part of this process, SAM assesses over 1,000 companies every year. Today, the DJSI family is used by asset managers in 14 countries and is the basis for \$5 billion AUD in assets under management.

SAM is headquartered in Zurich (Switzerland), with branches and representative offices in Barcelona, (Spain), Melbourne (Australia), Milan (Italy), Sonoma (California, USA), and Stockholm (Sweden). The office in Melbourne was opened in 2000.



## Members 2005

Company Name	AuSSI Industry Cluster
Amcor Ltd.	Materials
AMP Ltd.	Insurance
Australia & New Zealand Banking Group Ltd.	Banks
Australian Gas Light Co.	Utilities
Australian Pipeline Trust	Utilities
Australian Stock Exchange Ltd.	Diversified Financials
AWB Ltd.	Food, Beverage & Tobacco
BHP Billiton Ltd.	Mining & Metals
Billabong International Ltd.	Retailing
Bluescope Steel Ltd.	Mining & Metals
Brambles Industries Ltd.	Commercial Services & Supplies
CFS Gandel Retail Trust	Real Estate Investment Trusts
Chemeq Ltd.	Pharmaceuticals & Biotechnology
Coates Hire Ltd.	Commercial Services & Supplies
Coca-Cola Amatil Ltd.	Food, Beverage & Tobacco
Cochlear Ltd.	Healthcare, Equipment & Services
Coles Myer Ltd.	Food Retailing
Colorado Group Ltd.	Retailing
Commonwealth Property Office Fund	Real Estate Investment Trusts
Computershare Ltd.	Commercial Services & Supplies
Corporate Express Australia Ltd.	Commercial Services & Supplies
CSL Ltd.	Pharmaceuticals & Biotechnology
CSR Ltd.	Materials
David Jones Ltd.	Retailing
DCA Group Ltd.	Healthcare, Equipment & Services
Downer EDI Ltd.	Capital Goods
Envestra Ltd.	Utilities
FKP Property Group	Estate Management & Development
Foodland Associated Ltd.	Food Retailing
Foster's Group Ltd.	Food, Beverage & Tobacco
General Property Trust	Real Estate Investment Trusts
Insurance Australia Group Ltd.	Insurance
Investa Property Group	Real Estate Investment Trusts
Kingsgate Consolidated Ltd.	Gold
Leighton Holdings Ltd.	Capital Goods



Company Name	AuSSI Industry Cluster
Lend Lease Corp. Ltd.	Estate Management & Development
Lihir Gold Ltd.	Gold
Lion Nathan Ltd.	Food, Beverage & Tobacco
Macquarie Bank Ltd.	Diversified Financials
Mayne Group Ltd.	Healthcare, Equipment & Services
Miller's Retail Ltd.	Retailing
National Australia Bank Ltd.	Banks
National Foods Ltd.	Food, Beverage & Tobacco
Novogen Ltd.	Pharmaceuticals & Biotechnology
OneSteel Ltd.	Mining & Metals
Orica Ltd.	Materials
Origin Energy Ltd.	Energy
Oxiana Ltd.	Gold
Pacific Hydro Ltd.	Utilities
Perpetual Trustees Australia Ltd.	Diversified Financials
Qantas Airways Ltd.	Transportation
Qbe Insurance Group Ltd.	Insurance
Repco Corp. Ltd.	Retailing
Rio Tinto Ltd.	Mining & Metals
Santos Ltd.	Energy
Sigma Co. Ltd.	Pharmaceuticals & Biotechnology
Sonic Healthcare Ltd.	Healthcare, Equipment & Services
Southcorp Ltd.	Food, Beverage & Tobacco
St. George Bank Ltd.	Banks
Suncorp-Metway Ltd.	Diversified Financials
TABCorp Holdings Ltd.	Hotels, Restaurants & Leisure
Telstra Corp. Ltd.	Information Technology
Ten Network Holdings Ltd.	Media
Transfield Services Ltd.	Commercial Services & Supplies
Transurban Group	Transportation
United Group Ltd.	Capital Goods
Ventracor Ltd.	Healthcare, Equipment & Services
Wesfarmers Ltd.	Capital Goods
West Australian Newspapers Holdings Ltd.	Media
Westpac Banking Corp.	Banks
WMC Resources Ltd.	Mining & Metals