



ESG Data,
Ratings &
Benchmarking

道瓊斯可持續發展指數 2019 年評審結果

阿姆斯特丹、紐約、蘇黎世，2019 年 9 月 13 日：今日，世界領先的指數提供商標普道瓊斯指數（S&P DJI），攜手專注提供環境、社會及管治(ESG)數據、評級及基準服務的 RobecoSAM 旗下業務單元 SAM，宣佈道瓊斯可持續發展指數(DJSI)的年度評審結果。同時，今年亦是道瓊斯可持續發展世界指數（DJSI World）成為衡量及推進企業 ESG 實踐的第 20 週年。

按自由流通市值計算，道瓊斯可持續發展世界指數今年新增及移除的前三大公司為：

新增： Alphabet Inc、CVS Health Corp、利潔時（Reckitt Benckiser Group PLC）

移除： 花旗集團（Citigroup Inc¹）、荷蘭皇家殼牌（Royal Dutch Shell PLC）、3M Co

據評審結果，所有道瓊斯可持續發展指數均新增成份股，有關新成份股可在 [RobecoSAM 網站](#) 上查詢。所有變動將於 2019 年 9 月 23 日（星期一）生效。

自 1999 年起率先推行 ESG 評估及推廣 ESG 實務

今年是道瓊斯可持續發展世界指數面市 20 週年的重要里程碑。自 1999 年率先推出以來，該指數已確立了其作為衡量及推進企業 ESG 實務全球準則的標誌性地位。該指數為首個追蹤最大及領軍的可持續發展上市企業的全球指數。

SAM 可持續發展評估（CSA） 分析對財務有重大影響的 ESG 因素，再結合標普道瓊斯指數的編制方法從而計算得出結果，成為構建及維持整個指數系列的基礎。CSA 遵循以規則為基準的嚴格方法。在採用一系列與財務相關及行業特定的 ESG 標準進行評估後，每間公司均會獲得一個可持續發展總分。基於此可持續發展總分，遵循同類最優的方法，相關行業內排名前 10% 的公司將被納入道瓊斯可持續發展世界指數。

CSA 持續演進

CSA 逐年不斷優化，以識別及計量研究或報告覆蓋不足但對財務有重大影響的 ESG 因子。此過程有助於更好地發現能夠應對未來可持續發展方面挑戰及機遇的公司。目前，CSA 為每間公司提供約 1,000 個數據點，並成為釐定是否納入指數的基準。

在其演進過程中，CSA 鼓勵企業採取貫徹一致的實務，就當前的相關可持續發展主題以及可能對公司財務產生重大影響的前瞻性可持續發展事宜進行披露。

例如今年，投資者對「資訊安全、網絡安全及系統可用性」、「私隱保護」及「最低生活工資」等重要事項的管控及披露要求加強，因此相關的現有 CSA 標準獲得進一步提高。

對於尋求衡量並提升其可持續發展表現的公司，CSA **認可質素及穩健度** 的吸引力再創紀錄新高。這說明企業 ESG 表現披露已成為迎合主流投資者預期的必要條件。正如道瓊斯可持續發展指數先驅者所預期，近年來投資界對於將 ESG 因子融入其投資決策的重視程度正在不斷提高。

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¹仍為 DJSI 北美指數的成份股



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- DJSI及成份股變動載於[DJSI評審頁面](#)或[DJSI 世界產品頁面](#)
- 各行業表現最佳的公司載於[2019年行業領導者報告](#)
- 本年度的CSA年度方法及評分評審 (或註冊[網絡廣播](#))
- 一般的CSA方法載於[CSA資源中心](#)

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ABOUT ROBECOSAM

Founded in 1995, RobecoSAM is an investment specialist focused exclusively on Sustainable Investing. It provides asset management, impact analysis and investing, sustainability assessments, as well as ESG data, ratings, and benchmarking. Serving institutional asset owners and financial intermediaries, the company's asset management capabilities feature a strong track record in sustainability-themed strategies, together with expertise in strategies focused on the UN Sustainable Development Goals (SDGs). RobecoSAM was first to treat ESG as a standalone factor using its Smart ESG methodology. Since 1999 and together with S&P Dow Jones Indices, RobecoSAM has published the globally recognized Dow Jones Sustainability Indices (DJSI). Based on the "SAM* Corporate Sustainability Assessment" (CSA), an annual ESG analysis of over 4,700 listed companies, RobecoSAM has compiled one of the world's most comprehensive databases of financially material sustainability information. The CSA data is also included in USD 136 billion of assets under management at Robeco.

RobecoSAM is an affiliate of Robeco**, the Dutch investment management firm founded in 1929. Both companies share a joint mission: enabling clients to achieve their financial and sustainability goals by providing superior investment returns and solutions. Robeco is fully owned by ORIX Corporation Europe N.V., a subsidiary of ORIX Corporation.

As a reflection of its own commitment to advancing sustainable investment practices, RobecoSAM is a signatory of the PRI, UN Global Compact and Climate Action 100+, a supporter of the Task Force on Climate-related Financial Disclosure (TCFD), as well as a member of Eurosif, Swiss Sustainable Finance, Carbon Disclosure Project (CDP), and Portfolio Decarbonization Coalition (PDC), among others. As of June 30, 2019, RobecoSAM had client assets under management, advice and/or license of approximately USD 24.3 billion.

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