FUTURE OF SUSTAINABILITY
IN INVESTMENT MANAGEMENT

Roundtable Participants

CFA Institute gathered qualitative data for the report through 23 virtual roundtables conducted with industry leaders and practitioners in various locations across the globe. The people listed below* participated in one of those roundtables. Their attendance does not necessarily indicate their endorsement of the study or its contents. We are grateful for their input as well as that of the Future of Finance Advisory Council and Future of Finance Content Council.

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*The roundtables consisted of these individuals listed above, in addition to a number of participants who did not explicitly grant us permission to publicly list their names
The following organizations were represented at one or more of the virtual roundtables that provided qualitative data for this report. Readers should not assume that their participation indicates an endorsement of the report or its contents. We are grateful for their input.

Abbot Downing
Aberdeen Standard Investments
ABN Amro Bank
Actiam
Aegon Asset Management
Afore CitiBanamex
Afore Sura
AIA
Allfunds Bank
Allianz Global Investors
AllianzGI Sustainable Investing
AMIB
Amundi
Amundi Pioneer
ANBIMA
Asset Management One
AXA
Axis MF
Balanced Equity Management
Banco Inter
Banco Sicredi
BBVA Asset Management
BBVA Asset Management Mexico
BlackRock
Bloomberg
Bloomberg Intelligence
Blue Sky Group
BNP Asset Management
BNP Paribas Wealth Management
Brazilian Capital Markets Investors’ Association
BTC Pactual Chile
Cambridge Associates
CDPQ
CIBC Private Wealth Management
Cleveland Foundation
Colchester Global
Credit Suisse
Danske Bank
Deka Investment
Deloitte
DSP Investment Managers
Ecube Investment Advisors
EFG Asset Management
Eighteen48 Partners
Everbright Securities
Fiar Impact
Fidelity International
Fiduciary Trust
First Sentier Investors
First State
Fitch Ratings
Franklin Templeton
Gitterman Wealth
GMO
Great Lakes Advisors
Groupama Asset Management
Harvest Fund
Hawthorn Responsible Investing
Hemenway Trust
HSBC Bank
ICICI Prudential AMC
IHS Markit
Income Research + Management
Indianapolis Zoo
Intermediate Capital Group
Invesco
Japan Catalyst
JGP Asset Management
JP Morgan Asset Management
JP Morgan Asset Mgt
JP Morgan Chase Mexico
Julius Baer
Kempen Capital
LGIM
Lombard Odier
Loomis, Sayles & Co.
M&G
Maitri Asset Management
Man Group
Manulife
Marquette Associates
Melior Investment Management
Merian Global Investors
MFS
MGA Consulting
Mirova
Moody’s
Morgan Stanley Huaxin Fund
Morningstar
MSCI
Nasdaq
Natixis
NN Investment Partners
Nomura Research Institute
Northern Trust
Northern Trust Asset Management
Ossiam
Ostrum
Paribas
Pendal Group
Pension Protection Fund
Organizations Represented, continued

Pictet
PIMCO
Pingan Fund
PNC AM
PNC AM
PNC WM
PRIM
Prima AFP
Principal Asset Management
Mexiko
Profuturo Mexico
Promethos Capital
Quantum AMC
Rabo Bank
RBC Global Asset Management
RBC Wealth Management
Regnan
Riverbend Advisors
Robeco
Rokos Capital Management
S&P Global
Sanso Investment Solutions
Santander Bank Auto
SASB
SBI Funds Management
Schroders
SEB Bank
Securities Commission Mexico
Shinsei Corporate Investment
Stance Capital
Standard Chartered Bank
State Street Global Advisors
Steward Redqueen
Stewart Investors
Towne Ryan & Partners (Law Firm)

Trio Consultoria
TrustPlus Wealth Managers
UBP Investments
UBS Asset Management
UN JSPF
USS
UTI Funds
Vanguard
VisionDom
Vontobel
Wellington Management
Wells Fargo
William Blair
Willis Towers Watson