



> **Private Banking and Sustainable Investment
in Emerging Economies**

> 23 March 2007, 0830 - 1300hrs

> Auditório ANBID

Av. Brigaderio Faria Lima, 2179 - 11º andar

Jardim Paulista - São Paulo

> **Background / Agenda / Concept**



Background

Recent research shows that wealthy individuals have a growing interest in managing their wealth in accordance to the principles of sustainable development, but as yet often lack the means to do so.

Many private banks have the knowledge, products and expertise to satisfy this new line of demand, however, to date only institutional clients seem to be targeted.

In an increasingly competitive market place, where differentiation is key, and in the context of an ever more pressing sustainability agenda, it is vital for private banks to come firmly to grips with this new reality. This is especially true in emerging economies, where both HNWI (High Net Worth Individual) populations and wealth - but also competition - are growing the fastest.

In November 2006 the *United Nations Environment Programme Finance Initiative* (UNEP FI) convened a meeting of senior private bankers and representatives of *Genève Place Financière* at the UN *Palais des Nations* in Geneva to identify the barriers and drivers to sustainable and responsible investment in relationship banking. Building on this event's success, its promising results and participants' enthusiasm, UNEP FI is seeking to pursue these issues by addressing one of the fastest growing wealth management markets of the world: Brazil.

This event seeks to enable free discussion between panellists and participants and will be followed up by a number of actions directed at the private banking clientele itself. The key questions to be dealt during the event will be:

- > **The Rationale:** Sustainable Investment in Private Banking - Just Charity or the Better Product?
- > **The Market:** Latin American Demand for Sustainable Investment Products and the Role of Relationship Banks - to Service or to Foster?
- > **Action:** Risks and Opportunities in Developing Sustainability-Solutions for Private Clienteles in Emerging Economies. How to Overcome Barriers in Brazil?



Program

WELCOME COFFEE

0830hrs

WELCOME AND INTRODUCTION

0900hrs

- > **Opening Remarks**
Celso Scaramuzza (confirmed)
Head, ANBID, Private Banking Commission
- > **Background and Aims**
Paul Clements Hunt (confirmed)
Head, UNEP FI
- > **Sustainable Finance in Latin America**
Christopher Wells (confirmed)
Environmental Risk Manager for Latin America
ABN Amro Banco Real;
Chair, UNEP FI
Latin American Task Force

SUSTAINABLE INVESTMENT?

0930hrs

- > **Sustainable Investment as a New Class of Asset**
Luiz Maia (confirmed)
Director – Investment Management
Rio Bravo Investimentos
- > **The Institutional Drive of ESG*-Inclusion. ESG versus Performance?**
Xavier Desmadryl (confirmed)
Global Head of SRI Research
HSBC Investments;
Co-Chair, UNEP FI
Asset Management Working Group



PANEL DISCUSSION

1000hrs

Sustainable Investment and Private Banking in Emerging Economies: The Rationale – The Market - Action

- > **Moderator**
Leo Johnson (*confirmed*)
Director
Sustainable Finance Ltd

- > **Foreword**

Sylvia Brasil Coutinho (<i>confirmed</i>) Executive Director HSBC Bank Brasil S.A. Asset Management, International & Domestic Custody Private Bank Latin America	Pedro Bastos (<i>confirmed</i>) CEO HSBC Investments Brazil
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COFFEE BREAK

1115hrs

OPEN DISCUSSION

1145hrs

- > **Sustainable Investment in Private Banking: Just Charity or the Better Product?**
- > **Latin American Demand for Sustainable Investment Products and the Role of Relationship Banks: to Service or to Foster?**
- > **Risks and Opportunities in Developing Sustainability-Solutions for Private Clienteles in Emerging Economies. How to Overcome Barriers in Brazil?**

SUMMARY AND CLOSING REMARKS

1245hrs

- > **Résumé of the Main Points**
- > **Closing Remarks**



Concept Description


- > **Event Type** Presentation & Open Discussion.
- > **Audience** Expert group of senior private banking partners, asset managers, strategists, and responsible investment experts.
- > **Numbers & Access** 60-70 persons. On Invitation Only.
- > **Organiser** UNEP Finance Initiative / ANBID
- > **Host / Venue** ANBID
- > **Date** 23 March 2007
- > **Time** 0830 – 1300 hrs
- > **Language** English
- > **Materials** Participant Handouts (*Report: “Unlocking Value: the scope for environmental, social and governance issues in private banking”*).
- > **Follow Up** Further steps may include in-house awareness-raising sessions catered to selected client groups.

Upcoming UNEP FI Global Roundtable 2007

Melbourne, Australia, 24-25 October

UNEP Finance Initiative Global Roundtable
24-25 October 2007, Melbourne Park, Melbourne, Australia

Awareness to Action
Sustainable finance for today's global markets


UNEP Finance Initiative
Innovative financing for sustainability

For more information visit:

www.unepfi.org/melbourne