FAIRE 2008
Roundtable: SRI Indices: What For?
Paris, 11 June 2008
SRI Indices: What For?

1. Benchmarking Performance
2. Implementing Strategies
3. Engaging Corporations
SRI Indices: What Types?

1. Equity Indexes (Broad, Themes)
2. Fixed Income Indexes (Corporates, Supranationals, Countries)
3. Real Estate, Commodities, etc. ??
Benchmarking Performance

DJSI World, Performance since Launch, 08/99 – 04/08 (EUR, Total Return)
Implementing Strategies (I)

DJSI STOXX 40, since launch, 01/06 – 04/08 (EUR, Total Return)
Implementing Strategies (II)

Theme Indexes Examples

**European Renewable Energy Index (ERIX)**
- Launched on 13/10/2005
- Largest 10 European renewable energy companies
- Maximum 4 per subcluster
- Weighting equals 5% plus additional weight based on size at quarterly review
- Half-yearly review of composition

**World Water Index (WOWAX)**
- Launched on 02/02/2006
- Largest 20 companies active in the water business
- Minimum 5 per cluster
- Components are equally weighted
- Half-yearly review of composition

**World Solar Energy Index (SOLEX)**
- Launched on 30/03/2006
- Largest 10 global solar companies
- Weighting equals 5% plus additional weight based on size at quarterly review
- Half-yearly review of composition

**SGI Global Environment (WEX):**
- Launched on 03/10/2007
- Largest 30 global stocks in the business of alternative energy, water and waste management
- 10 stocks per cluster
- Components are marketcap weighted
- Half-yearly review of composition
Engaging Corporations

### Performance Scoreboard of Westpac’s CEO

<table>
<thead>
<tr>
<th>Performance condition</th>
<th>Summary description</th>
<th>Reason chosen</th>
<th>Method of assessment</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic profit1</td>
<td>Net profit less of capital (assumed to be 12% of shareholder funds)</td>
<td>Considered to be the best financial measure of shareholder value</td>
<td>Comparison of actual achievement against target set</td>
<td>Exceeded by 5.5%</td>
</tr>
<tr>
<td>Strategy</td>
<td>Achievement of organic growth strategy objectives, delivery of major program benefits and performance in merger and acquisition activity</td>
<td>Considered to be a critical component of the CEO role</td>
<td>Judgement of the Board</td>
<td>Exceeded</td>
</tr>
</tbody>
</table>
Contact:  
**SAM Indexes**  
Seefeldstrasse 215  
8008 Zurich  
Switzerland  
Phone: +41 44 395 2832  
Fax: +41 44 395 2850  
E-Mail: indexes@sam-group.com  