



# World Forum for a Responsible Economy 2019

Patrick Odier, Senior Managing Partner

Lille, 16.09.2019









Denis  
Pittet

Alexandre  
Zeller

Annika  
Falkengren

Hubert  
Keller

Patrick  
Odier

Christophe  
Hentsch

Frédéric  
Rochat

# Lombard Odier

Privately owned

Forward-looking

Long-term philosophy

**7**

Managing partners

**287 bn**

Total clients assets (CHF)

**AA-**

Fitch rating

**28.2%**

Common Equity  
Tier 1 ratio (CET1)

**2,500**

Employees

**26**

Offices



# Lombard Odier: sustainable investing is in our DNA

<p><b>1796</b></p> 	<p><b>1863</b></p> <p>Contribution of the foundation of the future Red Cross</p> 	<p><b>1910</b></p> <p>Among the first private companies to establish an employee pension fund</p> 	<p><b>1997</b></p> <p>Introduces ESG scoring methodology</p>
 <p><b>2011</b></p> <p>First Group Exclusion Policy: Controversial weapons</p>	 <p><b>2008</b></p> <p>Fondation Philanthropia creation &amp; Co-founder of Sustainable Finance Geneva</p>	 <p><b>2007</b></p> <p>Early signatory to UN PRI &amp; Partnership with Generation</p>	
<p><b>2012</b></p> <p>New ESG/CAR scoring methodology</p> 	<p><b>2013</b></p> <p>Second Group Exclusion Policy: Essential food commodities</p> 	<p><b>2016</b></p> <p>Creation of LO Carbon Intensity Radar</p> 	<p><b>2017</b></p> <p>Partnership with Affirmative Inv. Mgmt. for Global Climate Bond fund launch</p>
 <p><b>2019</b></p> <p>First global wealth and asset manager to be awarded B Corp Certification</p>	 <p><b>2018</b></p> <p>Signatories to UN Global Compact</p>	 <p><b>2017</b></p> <p>New Sustainable Development Goals scoring methodology</p>	

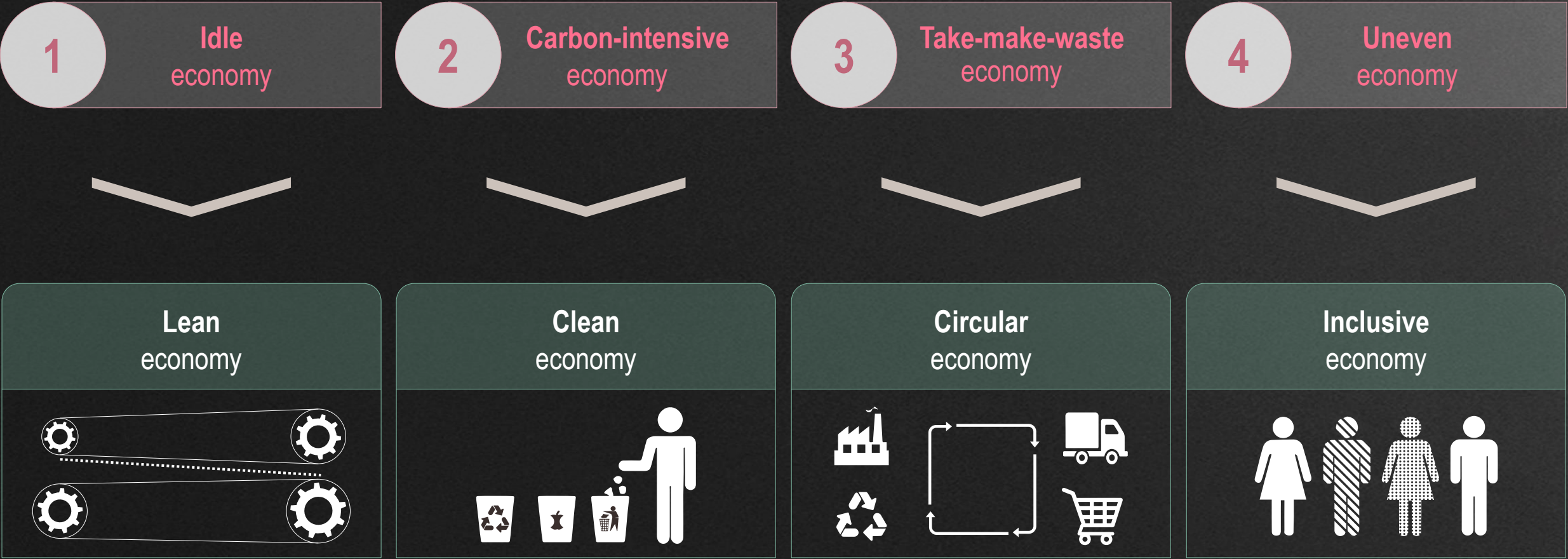


## Sustainable Finance Week Geneva «Building Bridges» October 7-10

- Bridge the world of finance and the UN Sustainable Development Goals to accelerate the financial industry's contribution to the achievement of these goals.
- Promote tangible action thanks to a mutual understanding between all players in sustainable finance: banks, investors, governments, companies, the United Nations and civil society.
- October 10 summit brought together 800 decision-makers: banks, investors, governments, companies, the United Nations, civil society.
- Thanks to its unique ecosystem, Geneva has a special role to play in building these bridges and accelerating the implementation of Agenda 2030 by means of increased responsible investment.



# A potential recipe for decoupling: a Lean, Clean, Circular and Inclusive economy



Source: LOIM. For illustrative purposes only.





eagle.

/ˈi:g(ə)l/ noun (financial)

person or organisation with far-sighted  
vision committed to sustainable  
behaviours and growth strategies.

rethink everything.



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PRIVATE CLIENTS  
ASSET MANAGEMENT  
TECHNOLOGY

Find out more at [lombardodier.com](http://lombardodier.com)

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ostrich.

/ˈɒstrɪtʃ/ noun (financial)

person or organisation failing to see or act  
upon the need for a sustainable growth strategy;  
see also: *head in the sand*.

rethink everything.



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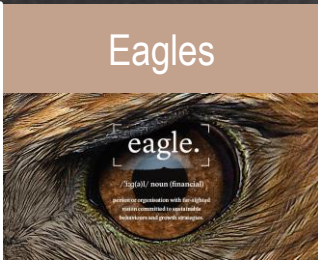
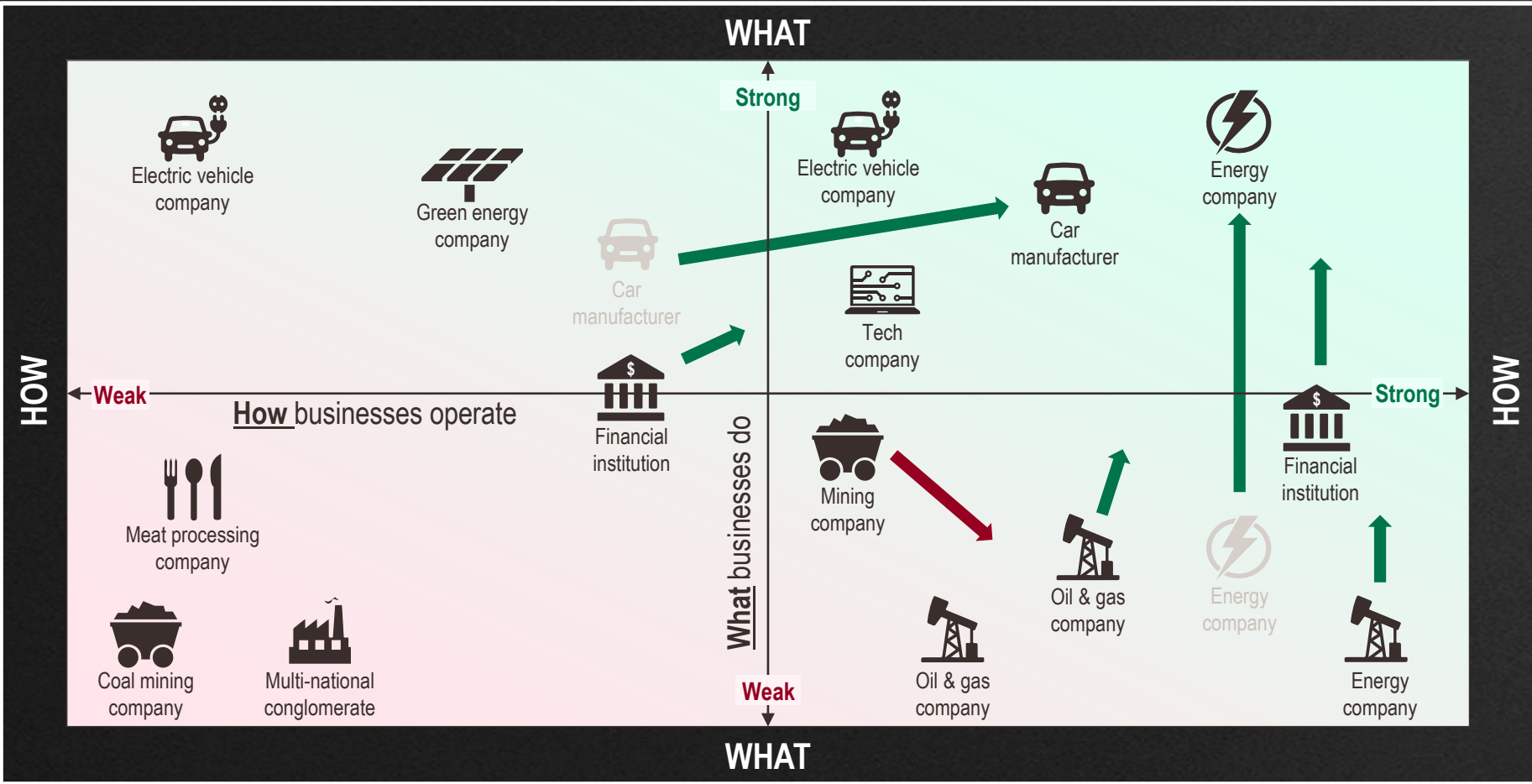
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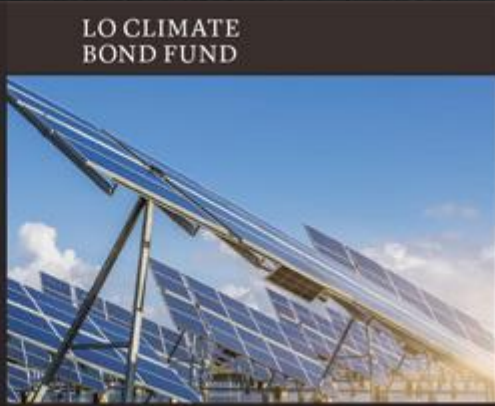
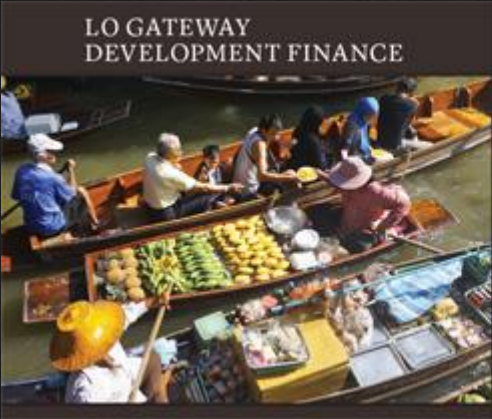
# Our two-dimensional ESG rating



Source: LOIM. For illustrative purposes only.



# Impact Investments Examples



Examples:  
 Annapurna Microfinance, India  
 Seacorp, Peru  
 Tafila Wind Farm, Jordan  
 Twiga, Kenya  
 Metro de Santiago, Chile  
 Qinghai Rural Water Resource Management, China

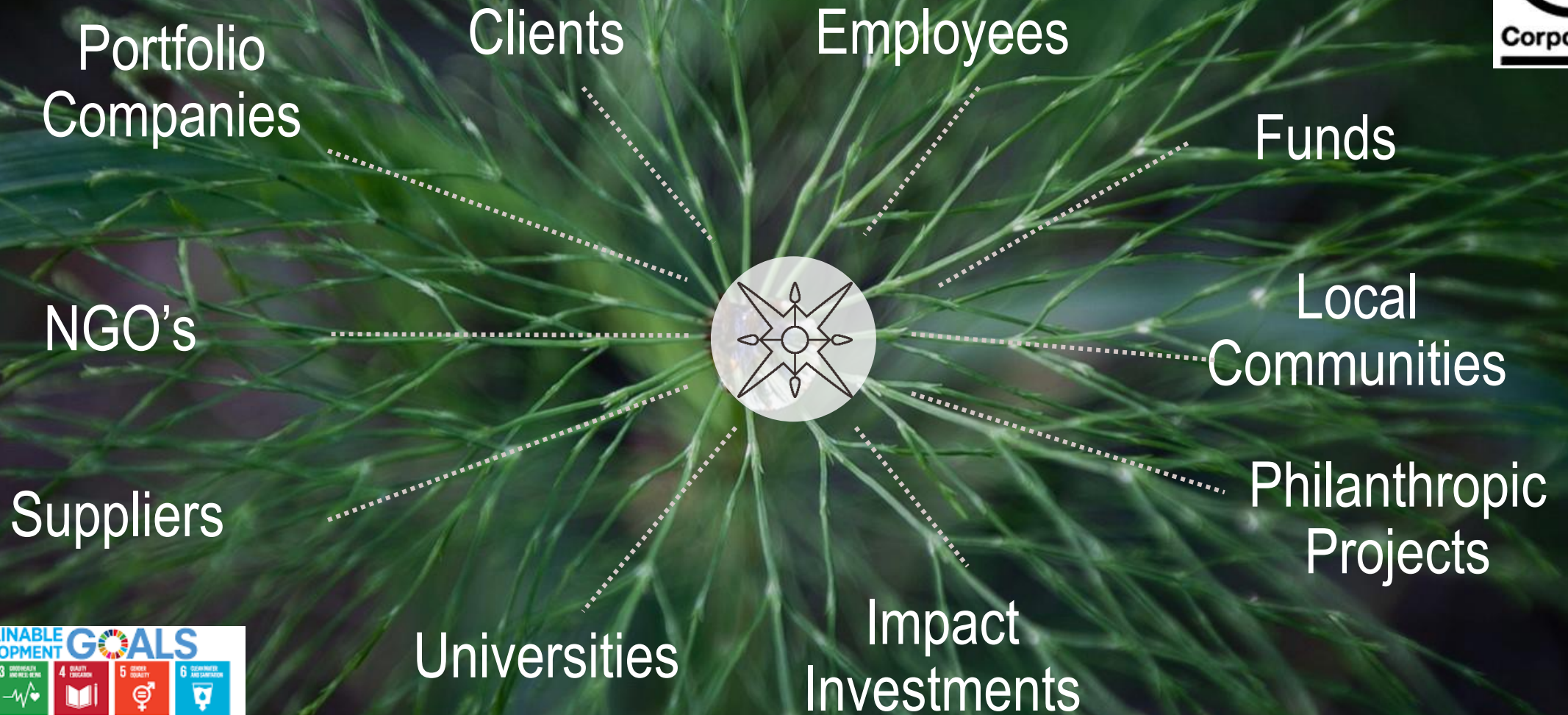
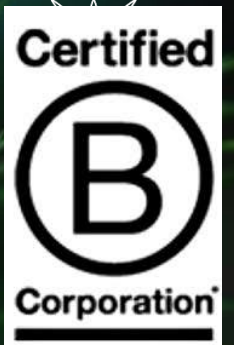


# Philanthropy





# Responsibilities to Multiple Stakeholders











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