



## 5 Myths of Sustainable Investing

Demographic and political trends are driving growth in investment strategies incorporating environmental, social, and governance criteria. But how is sustainability measured? Must investors pay a performance penalty? And is the ETF market for sustainability mature? This session will examine the key questions surrounding ESG investing through an index provider's lens.

### Morningstar

Morningstar, Inc. is a leading provider of independent investment research in North America, Europe, Australia, and Asia. The company offers an extensive line of products and services for individual investors, financial advisors, asset managers, and retirement plan providers and sponsors. Morningstar provides data on nearly 540,000 investment offerings, including stocks, mutual funds, and similar vehicles, along with real-time global market data on approximately 18.5 million equities, indexes, futures, options, commodities, and precious metals, in addition to foreign exchange and Treasury markets. Morningstar also offers investment management services through its investment advisory subsidiaries, with more than \$200 billion in assets under advisement and management as of Sept. 30, 2016. The company has operations in 27 countries.

### Dan Lefkovitz



Dan Lefkovitz is strategist for Morningstar Indexes, producing research supporting Morningstar's index capabilities across a range of asset classes. He contributes to the Morningstar Direct<sup>SM</sup> Research Portal and Morningstar Blog, authors white papers, and appears in webinars and at industry conferences. Before assuming this role in 2015, he spent 11 years on Morningstar's manager research team. He held several different roles, including fund analyst and director of the company's institutional research service. From 2008 to 2012, he was based in London, helping to build a team across Europe and Asia. Lefkovitz also participated in the development of the Morningstar Analyst Rating<sup>TM</sup> and the Global Fund Report. As an analyst, he specialized in global equities strategies and edited the *Fidelity Fund Family* report newsletter from 2006 to 2008. He has made media appearances on CNBC, Bloomberg Television, and the Wall Street Journal. Before joining Morningstar in 2004, Lefkovitz served as director of risk analysis for Marvin Zonis + Associates, a Chicago-based consultancy. In this role, he coauthored *The Kimchi Matters: Global Business and Local Politics in a Crisis-Driven World* (Agate, 2003). Lefkovitz holds a bachelor's degree from the University of Michigan and a master's degree from the University of Chicago.

### Contact details

Phone: +41 43 222 46 60

E-Mail: [SwissSalesTeam@morningstar.com](mailto:SwissSalesTeam@morningstar.com)

Website: [www.morningstar.ch](http://www.morningstar.ch)