



## BMO Global Asset Management

### **Integrating ESG in a Global Equity Portfolio**

- (i) Understand the investment responsible investment rationale to generate both
  - a. A financial return; and
  - b. Non-financial positive impact.
- (ii) How does the analysis of ESG factors impact valuation?
- (iii) Why is engagement/active ownership relevant for investors?

### **BMO Global Asset Management**

BMO Global Asset Management forms part of the BMO Financial Group. With total assets of US\$852 billion BMO provides a broad range of retail banking, wealth management and investment banking products and services.

BMO Global Asset Management (EMEA) has a rich history of managing a wide variety of asset classes, dating back to the creation of the world's first investment trust in 1868, which we still manage today. We have also been pioneers in responsible investment since we launched Europe's first ethical strategy in 1984. We have since adopted an innovative approach to responsible investment, continually enhancing our offering to cater for an increasingly demanding marketplace and we have more than US\$ 140 billion under ESG advice. We recognise the important role environmental, social and governance (ESG) related issues play in the creation of long-term investor value. As a member of the United Nations Principles for Responsible Investment (UN PRI), we are committed to the exercise of responsible investment practices throughout the BMO Global Asset Management Group.



### **Jamie Jenkins**

Jamie Jenkins is Co-Head of the Global Equities team, Lead Portfolio Manager of the BMO Responsible Global Equity Fund and Lead Portfolio Manager of BMO SDG Global Equity Fund. Jamie joined the firm in 2000. Prior to joining the firm, Jamie worked at Hill Samuel Asset Management as a Japanese Equities Fund Manager. He holds an MA in History from the University of Edinburgh, has IMC and IIMR qualifications and is a member of the CFA Society of the UK.

Contact: Rochus Appert  
Phone: +41 44 488 19 51  
E-Mail: [rochus.appert@bmogam.com](mailto:rochus.appert@bmogam.com)  
Website: [www.bmo.com](http://www.bmo.com)