



pipeline™ exclusive - Environmental SRI fund targets companies in excess of Eur400 million valuation

Switzerland | Socially Responsible Investments |

Date Announced: 14-Jul-2009

Date Completed: Pending

Zegora Investment Management Ltd. ("Zegora"), based in Zurich, Switzerland is an investment management company specializing in Socially Responsible Investments ("SRI"). The company manages and distributes the Zegora Environmental Fund, its first investment vehicle which was launched in June 2006. This open-end fund makes un-leveraged investments in listed companies with a market capitalization of above Eur400 million. The Zegora Environmental Fund targets three company categories: "primary" companies, for which the environmental benefits are inherent, such as renewable energy, waste management, water treatment and green transportation companies (mostly rail); "secondary" companies, for which the benefits depend on the corporate social responsibility of the company in agriculture and forestry, non-renewable energy and transportation; and "growth" companies, which are usually technology companies enabling both significant growth potential and environmental benefits, such as energy conservation and pollution control.

Speaking to VB/Research Andrea Schurter, Investment Manager at Zegora Investment Management, said that exposure is expected to be 70% towards primary companies, 25% towards secondary companies and 5% towards growth category companies. Zegora currently manages Eur8 million and expects to invest in up to 30 companies. Schurter added the investment strategy aims to create a diversified global portfolio and the fund will typically invest in only one company within the same sector and the same country.

Please contact Andrea Schurter, Investment Manager, on: schurter@zegora.com for more information on Zegora Investment Management Ltd. and the Zegora Environmental Fund.

Zegora Investment Management Ltd.

www.zegora.com

Andrea Schurter
Investment Manager

email
schurter@zegora.com

telephone
+41 44 800 80 80

