Case Study:
SRI within a Japanese Financial Institution

at KATOOMBA V
November 6th, 2002

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Our Commitment

• Managing ASUNOHANE Fund.

• Supporting NGOs

• “SRI Lounge“
Investment Process in Asunohane

Listed Companies on Japanese Stock Market (approx. 3500)

Top 700’s by Market Cap.

Investment Universe 300 stocks

Final Portfolio 50-100 stocks

Screening
•Environment
•Employee
•Consumer Relation
•Community Involvement

Final Decision
•Evaluate CSR & Strategy
•Earnings & Cash Flows
•Valuation

Risk Control
Frameworks

Concept:

Strategy:

Operation:

Mission & Vision

Social Responsibility

Competitive Strategy

Environment

Consumer

Value Chain

Employee

Community

Profit
Objective and Philosophy

- Multi Stakeholder Approach
- Corporate Social Leadership