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## AMF

### PRI reporting framework 2018

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**Promoting responsible investment****SG 09. Collaborative organisations / initiatives**

New selection options have been added to this indicator. Please review your prefilled responses carefully.

**09.1. Select the collaborative organisation and/or initiatives of which your organisation is a member or in which it participated during the reporting year, and the role you played.**

Select all that apply

☒ Principles for Responsible Investment**Your organisation's role in the initiative during the reporting period (see definitions)**

Moderate

**Provide a brief commentary on the level of your organisation's involvement in the initiative. [Optional]**

AMF is participating in the Advisory Committee of Infrastructure within PRI.

AMF participated in four collaborative engagements within PRI:

1. Human rights within the extractive industry
2. Sustainable Stock Exchanges
3. Corporate carbon footprint disclosure
4. Cattle-linked deforestation

- ☐ Asian Corporate Governance Association
- ☐ Australian Council of Superannuation Investors
- ☐ AFIC – La Commission ESG
- ☐ BVCA – Responsible Investment Advisory Board
- ☒ CDP Climate Change

**Your organisation's role in the initiative during the reporting period (see definitions)**

Basic

**Provide a brief commentary on the level of your organisation's involvement in the initiative. [Optional]**

AMF is a signatory of CDP climate change. We use their data and platform mainly for company and sector analysis.

☒ CDP Forests**Your organisation's role in the initiative during the reporting period (see definitions)**

Basic

**Provide a brief commentary on the level of your organisation's involvement in the initiative. [Optional]**

AMF is a signatory of CDP Forests. We use their data and platform mainly for company and sector analysis.

☒ CDP Water

**Your organisation's role in the initiative during the reporting period (see definitions)**

Basic

**Provide a brief commentary on the level of your organisation's involvement in the initiative. [Optional]**

AMF is a signatory of CDP Water. We use their data and platform mainly for company and sector analysis.

- ☐ CFA Institute Centre for Financial Market Integrity
- ☐ Code for Responsible Investment in SA (CRISA)
- ☐ Code for Responsible Finance in the 21st Century
- ☐ Council of Institutional Investors (CII)
- ☐ Eumedion
- ☐ Extractive Industries Transparency Initiative (EITI)
- ☐ ESG Research Australia
- ☐ EVCA – Responsible Investment Roundtable
- ☐ Global Investors Governance Network (GIGN)
- ☐ Global Impact Investing Network (GIIN)
- ☒ Global Real Estate Sustainability Benchmark (GRESB)

**Your organisation's role in the initiative during the reporting period (see definitions)**

Basic

**Provide a brief commentary on the level of your organisation's involvement in the initiative. [Optional]**

AMF subsidiary in real estate, AMF Fastigheter, has started to report via GRESB during 2017.

- ☐ Green Bond Principles
- ☐ Institutional Investors Group on Climate Change (IIGCC)
- ☐ Interfaith Center on Corporate Responsibility (ICCR)
- ☐ International Corporate Governance Network (ICGN)
- ☐ Investor Group on Climate Change, Australia/New Zealand (IGCC)
- ☐ International Integrated Reporting Council (IIRC)
- ☐ Investor Network on Climate Risk (INCR)/CERES
- ☐ Local Authority Pension Fund Forum
- ☐ Principles for Sustainable Insurance
- ☒ Regional or National Social Investment Forums (e.g. UKSIF, Eurosif, ASRIA, RIAA), specify

Swesif

**Your organisation's role in the initiative during the reporting period (see definitions)**

Moderate

**Provide a brief commentary on the level of your organisation's involvement in the initiative. [Optional]**

In Swesif we collaborate with like-minded organisations to seek improvement in transparency and standards on ESG. This year AMF hosted and moderated an event in November regarding the Taskforce on Climate Related Financial Disclosure together with Swesif and WWF in order to broaden the learning about the new recommendations and provide a forum for discussion with other investors.

- ☐ Responsible Finance Principles in Inclusive Finance
- ☐ Shareholder Association for Research and Education (Share)
- ☐ United Nations Environmental Program Finance Initiative (UNEP FI)
- ☒ **United Nations Global Compact**

**Your organisation's role in the initiative during the reporting period (see definitions)**

Basic

**Provide a brief commentary on the level of your organisation's involvement in the initiative. [Optional]**

AMF signed United nations Global Compact 2014 and produced its first Communicatin on Progress in February 2015

- ☒ **Other collaborative organisation/initiative, specify**

The Institutional Investors Association in Sweden

**Your organisation's role in the initiative during the reporting year (see definitions)**

Advanced

**Provide a brief commentary on the level of your organisation's involvement in the initiative. [Optional]**

AMF Chairs the Institutional Investors Association in Sweden. We give input to legislation and compliance standards. The Association consists of 16 institutional owners holding approximately 20% of OMX Nasdaq Stockholm Stock Exchange

- ☒ **Other collaborative organisation/initiative, specify**

Swedish Investment Fund Association

**Your organisation's role in the initiative during the reporting year (see definitions)**

Advanced

**Provide a brief commentary on the level of your organisation's involvement in the initiative. [Optional]**

AMF is Member of the Board.

The Association has over 40 member companies which collectively represent the majority of fund-based saving in Sweden.

- ☒ **Other collaborative organisation/initiative, specify**

**Your organisation's role in the initiative during the reporting year (see definitions)**

Advanced



**Provide a brief commentary on the level of your organisation's involvement in the initiative. [Optional]**

AMF is a Member of the Board.

The organisation nominates members to the Swedish Corporate Governance Board, the Swedish securities Council, the Council for Financial Reporting. AMF is also a member of the nomination committee in the Council for Financial Reporting.

Good governance and compliance is vital for a well functioning financial market. Issuers and members of the Nasdaq Stockholm Exchange need to comply with exchange regulation. A Swedish Regulated Market is required by law and regulation to appoint a Disciplinary Committee to handle matters of suspected violations of exchange regulation. AMF participates in the Disciplinary Committee which is an independent body from the Nasdaq Stockholm Exchange.

☒ **Other collaborative organisation/initiative, specify**

Swedish Investors for Sustainable Development

**Your organisation's role in the initiative during the reporting year (see definitions)**

Moderate



**Provide a brief commentary on the level of your organisation's involvement in the initiative. [Optional]**

A network for knowledge sharing around Agenda 2030. GRI and UN Global Compact called on the Swedish investor community to engage in discussions on UN Sustainable Development Goals. AMF has participated in meetings hosted by SIDA. AMF was one of many investors who signed a letter called "the Stockholm Declaration" emphasizing the commitment of the gathered investment community towards contributing to the UN Sustainable Development Goals.

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## SG 09.2. Assets managed by PRI signatories (Private)

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### SG 10. Promoting RI independently

**10.1. Indicate if your organisation promotes responsible investment, independently of collaborative initiatives.**

☒ Yes

**10.2. Indicate the actions your organisation has taken to promote responsible investment independently of collaborative initiatives. Provide a description of your role in contributing to the objectives of the selected action and the typical frequency of your participation/contribution.**

☒ Provided or supported education or training programmes (this includes peer to peer RI support) Your education or training may be for clients, investment managers, actuaries, broker/dealers, investment consultants, legal advisers etc.)

Description

Took part in a training day for the legal advisers to AMF Funds and their partner network of associates (approx 30 people) and spoke about responsible investing today and tomorrow.

### Frequency of contribution

- ☐ Quarterly or more frequently
  - ☐ Biannually
  - ☐ Annually
  - ☐ Less frequently than annually
  - ☒ **Ad hoc**
  - ☐ Other
- ☐ Provided financial support for academic or industry research on responsible investment
  - ☐ Provided input and/or collaborated with academia on RI related work
  - ☐ Encouraged better transparency and disclosure of responsible investment practices across the investment industry
  - ☒ **Spoke publicly at events and conferences to promote responsible investment**

### Description

TBLI Conference in Stockholm September 2017.  
AMFs Head of Equities has participated in seminar panels in OMX Nasdaq stock exchange promoting gender diversity in boards.

### Frequency of contribution

- ☐ Quarterly or more frequently
  - ☐ Biannually
  - ☐ Annually
  - ☐ Less frequently than annually
  - ☒ **Ad hoc**
  - ☐ Other
- ☐ Wrote and published in-house research papers on responsible investment
  - ☐ Encouraged the adoption of the PRI
  - ☒ **Responded to RI related consultations by non-governmental organisations (OECD, FSB etc.)**

### Description

AMF responded to both the EU 'Public consultation on institutional investors and asset managers' duties regarding sustainability' and the Taskforce on Climate Related Financial Disclosure.

### Frequency of contribution

- ☐ Quarterly or more frequently
- ☐ Biannually

- ☐ Annually
- ☐ Less frequently than annually
- ☒ **Ad hoc**
- ☐ Other

- ☐ Wrote and published articles on responsible investment in the media
- ☒ **A member of PRI advisory committees/ working groups, specify**

### Description

Member of the Advisory Committee of Infrastructure

### Frequency of contribution

- ☒ **Quarterly or more frequently**
- ☐ Biannually
- ☐ Annually
- ☐ Less frequently than annually
- ☐ Ad hoc
- ☐ Other
- ☐ On the Board of, or officially advising, other RI organisations (e.g. local SIFs)
- ☐ Other, specify
- ☐ No

## 10.3. Describe any additional actions and initiatives that your organisation has taken part in during the reporting year to promote responsible investment [Optional]

Regarding fixed income AMF participated in PRI collaborative engagement and signed letters to promote credit rating agencies to include ESG factor into their credit ratings because of the role that the agencies play in establishing de facto standards for disclosure by issuers.

AMF is also participating in a working group within the 'Swedish Insurers' regarding green bonds.

## SG 11. Dialogue with public policy makers or standard setters (Private)

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