

# Dow Jones Sustainability Indexes

A cooperation of Dow Jones Indexes, STOXX Ltd. and SAM Group

Press Release  
Zurich, January 9, 2004

## 50<sup>th</sup> License Agreement Signed for the Dow Jones Sustainability Indexes

SAM Indexes today announced that the Dow Jones Sustainability Indexes (DJSI) have been licensed to Canada's Credit Union Central Alberta Ltd (CUCA). Together with a new contract signed earlier in December by Switzerland-based Private Client Bank, the agreement with CUCA raises the number of DJSI licenses to 50.

"We are happy to be part of the DJSI's success and delighted to have hit the 50-mark for the licensing of these benchmarks. As Canadian investors become increasingly interested in the concept of sustainability and its possible links to financial performance, the DJSI family provides us with a rigorous and solid foundation to move into this market", says Pat Dolan, Assistant Vice President Treasury of Credit Union Central Alberta Ltd.

"2003 was a very good year for us and the signing of the 50<sup>th</sup> DJSI license certainly a great milestone to bring it to a close. During the last twelve months, DJSI-based assets increased by over 40% and now stand at nearly 2.5 billion EUR. The DJSI World gained 13.6% – outperforming the 13.1% of the DJ World Index as well as the MSCI World's 11.3%. We are highly encouraged by these developments and are looking forward to building up on this strong platform in 2004", says Alexander Barkawi, Managing Director of SAM Indexes.

### Note to the editor:

Established in 1999, the Dow Jones Sustainability Indexes were launched as the first global indexes tracking the financial performance of the leading sustainability-driven companies worldwide. Based on the cooperation of Dow Jones Indexes, STOXX Limited and SAM they provide asset managers with reliable and objective benchmarks to manage sustainability portfolios. 50 DJSI licenses are currently held by asset managers in 14 countries to manage a variety of financial products including actively and passively managed funds, certificates and segregated accounts. In total, they presently manage close to 2.5 billion EUR based on the DJSI. A list of the DJSI licensees is available at [www.sustainability-indexes.com/html/other/licensing.html](http://www.sustainability-indexes.com/html/other/licensing.html).

The Dow Jones Sustainability World Indexes (DJSI World) cover the top 10% of the biggest 2,500 companies in the Dow Jones World Index in terms of economic, environmental and social criteria. As a benchmark for European sustainability investments, the Dow Jones STOXX Sustainability Indexes (DJSI STOXX) cover the leading 20% in terms of sustainability of the companies in the Dow Jones STOXX<sup>SM</sup> 600 index. The selection of index components follows a rule-based process defined in the DJSI Guidebooks. It is based on a thorough assessment of general and industry-specific sustainability criteria. The analysis is verified by an external auditor. Full details about the design philosophy, review methodology and index components are freely available at [www.sustainability-indexes.com](http://www.sustainability-indexes.com).

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