

## Press Release

Abu Dhabi, Boston, Frankfurt, London, Melbourne, Nice, Singapore, Sydney, Tokyo, September 6, 2022

# Scientific Beta announces expansion into Australia and New Zealand

Scientific Beta has announced that it will be setting up offices in Melbourne and Sydney and hiring two senior investment professionals as part of an expansion into the Australian and New Zealand (ANZ) markets. Joining the Scientific Beta ANZ team in Australia are Susan Rodgers as Business Development Director and Mike Aked as Senior Investment Specialist.

David Wickham, Scientific Beta's Deputy CEO and Global Sales and Client Director, said, "We are very excited about Scientific Beta's expansion to serve the Australian and New Zealand markets, especially in view of the quality of Susan and Mike as our new hires in the region. They both have the knowledge and expertise to ensure that Scientific Beta will be as successful in ANZ as we have been globally. We are confident that Susan and Mike will foster the adoption by ANZ institutional investors, asset managers and consultants of the award-winning Climate Impact Consistent Indices (CICI), the flagship Scientific Beta multi-factor indices, available with ESG and Low Carbon filters, and Scientific Beta's suite of macro-tilted and thematic equity indices."



Susan Rodgers joins Scientific Beta from State Street Global Advisors (SSGA) in Sydney, where she was Senior Account Executive and Vice President, having previously worked with SSGA in London. Susan also worked in client service and business development roles with BZW Investment Management (UK and Australia) and Bankers Trust Asset Management. She brings a successful track record and extensive knowledge of the institutional investment industry to Scientific Beta. Susan is based in Sydney.



Mike Aked was previously Partner, Head of Research - Australia and Global Head of Asset Allocation with Research Affiliates. He has also worked with the University of Virginia Investment Management Company (UVIMCO), Sunsuper, and UBS Global Asset Management across the US, Europe, Asia, and Australia. Mike brings a wealth of academic and practical experience in fundamental, quantitative and factor investing across both single and multi-asset class frameworks. He is now based in Melbourne.



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## About Scientific Beta

Scientific Beta aims to encourage the entire investment industry to adopt the latest advances in smart factor and ESG/Climate index design and implementation. Established in December 2012 by EDHEC-Risk Institute, one of the top academic institutions in the field of fundamental and applied research for the investment industry, as part of its mission to transfer academic know-how to the financial industry, Scientific Beta shares the same concern for scientific rigour and veracity, which it applies to all the services that it provides to investors and asset managers. We offer the smart factor and ESG/Climate solutions that are most proven scientifically, with full transparency of both methods and associated risks.

On January 31, 2020, Singapore Exchange (SGX) acquired a majority stake in Scientific Beta. SGX is maintaining the strong collaboration with EDHEC Business School, and principles of independent, empirical-based academic research, that have benefited Scientific Beta's development to date.

Scientific Beta has developed two types of expertise over the years corresponding to two major concerns for investors:

- Expertise in the area of Smart Beta, and more particularly factor investing
- Expertise in the area of ESG, and particularly Climate investing

To date, Scientific Beta is offering two major types of climate objectives:

Since 2015, offerings with financial objectives respecting ESG and Carbon constraints. These offerings correspond to the application of exclusion filters, the design of which allows the financial characteristics of the index to be conserved. This involves reconciling financial objectives and compliance with ESG norms and climate obligations. As such, the Core ESG, Extended ESG and Low Carbon filters can be integrated into smart beta or cap-weighted offerings in line with the financial objectives targeted by the investor.

Since 2021, Scientific Beta has been offering indices with pure climate objectives (Climate Impact Consistent Indices) that allow climate exclusions and weightings to be combined in order to translate companies' climate alignment engagement into portfolio decisions.

Since it was acquired by SGX in January 2020, Scientific Beta has accelerated its investments in the area of Climate Investing as part of the SGX Sustainable Exchange strategy, which is mobilising an investment of SGD 20 million. In addition, EDHEC and Scientific Beta have set up a EUR 1 million/year ESG Research Chair at EDHEC Business School.

With a concern to provide worldwide client servicing, Scientific Beta is present in Boston, London, Nice, Singapore and Tokyo. As of June 30, 2021, the Scientific Beta indices corresponded to USD 63.75bn in assets under replication. Scientific Beta has a dedicated team of 55 people who cover not only client support from Nice, Singapore and Boston, but also the development, production and promotion of its index offering. Scientific Beta signed the United Nations-supported Principles for Responsible Investment (PRI) on September 27, 2016. Scientific Beta became an associate member of the Institutional Investor Group on Climate Change (IIGCC) on April 9, 2021.

Today, Scientific Beta is devoting more than 40% of its R&D investment to Climate Investing and more than 45% of its assets under replication refer to indices with an ESG or Climate flavour. As a complement to its own research, Scientific Beta supports an important research

initiative developed by EDHEC on ESG and climate investing and cooperates with V.E and ISS ESG for the construction of its ESG and climate indices.

On November 27, 2018, Scientific Beta was presented with the Risk Award for Indexing Firm of the Year 2019 by the prestigious professional publication Risk Magazine. On October 31, 2019, Scientific Beta received the Professional Pensions Investment Award for “Equity Factor Index Provider of the Year 2019.”

